Howie

Howie Basics and Checklists

Your Guide to Navigating and Doing Loops

This document explains in detail some key elements of how to operate as a Howie AI Trainer. Your job is to **review the AI's scheduling-related tool call predictions, correct them if necessary**, and **finalize all scheduling actions with complete accuracy**.

Carefully review and reference these guidelines whenever questions arise. There's a LOT of information, so use the table of contents or outline, search/find, and come back to re-review things that might've seemed confusing before you got the hang of things.

Table of Contents for This Tab

You can also see the table of content in the outline on the left (click the name of this tab)

First: A Few Quick Tips!

Be sure to review all your resources, but this list highlights a few of the top tips that might be helpful.

- **Trust Howie, but verify.** Our role isn't to do Howie's work from scratch, always look at how Howie wants to proceed.
- **Use loop chat!** Ask loop chat to summarize a user's preferences, ask them what's on the calendar a particular day, give it an event ID for more info, ask for timezone conversions, convert Tue, Jun 24 to YYYY-MM-DD HH:mm format, etc.
- **Search!** Command + F on Mac to search in a loop (preferences, JSON, etc.) or these resource docs. Some helpful words to search for:
  - On Howie:
    - "sign off", "signature", "title", "name"
    - "never", "always", "do not", "ask", "permission"
    - "buffer", "back to back", "break", "stack", "group", "same day"
    - "zoom", "google meet"
    - a person's name, a meeting name, timezone, etc.
  - **In these resource docs:** anything that you're trying to figure out, like "white label", "timer", etc.
- Part of the benefit of Howie is that there is less human error. When you can, copy and paste email addresses, names, use {{timeslots}}, etc.
- Always **wait for AI Guidance** to load.
- If you're not sure, always take the **safest course of action.** More about the safest course of action here.
- **Mindset First:** You CAN be resourceful — many errors can be fixed! There IS usually a path forward.
- Remember the big picture, key principles, overall guidance, and key resources.

Who's Who?

- **Howie Customers** are mostly startup founders, VCs, CEOs, and early adopters of technology. We are currently waitlist only. Customers are segmented as:
  - **Member:** These are paying customers
  - **Pro-Member:** These are White Label customers. They receive a Custom name & domain (with email signature and sign-off) and priority processing (their messages jump to the front of the queue and get noticeably faster replies).
  - **Unpaid Member:** These are members whose payments have lapsed, but we still treat them as members
- Scheduling includes **Hosts** and **Guests**
  - The Host is the Howie Member who requested Howie's help. Others on the thread are Guests, even if they are also Members/paying customers.
- **User:** Anyone using Howie, including non-members.

Key Tool Calls

Tool Calls are actions Howie can take, like checking a User's calendar, scheduling a meeting, or replying to an email. Howie interprets the input and proposes specific actions (aka tool calls like queryCalendars). You'll check if the need (tool call) Howie identified is what's needed. More about specific tool calls below:

Name	What it Means and Some Key Info (more detail below)
queryCalendar	View the user's calendar, based on date parameters ***Query first!*** *Howie needs the data from the query in order to function, it doesn't automatically have all of the customer's data.The calendar query is accurate at the time you ran it. If you think something may have just changed or been updated, you'll need to query again.* *Don't overquery - too much unnecessary data slows Howie down.*
Email Tool Calls (replyEmail and startEmailThread	**replyEmail** Reply to an email in an existing thread (include the replyTo ID). **startEmailThread** Send an email to a new thread (no replyTo argument). If it's a brand-new email (not a reply), select startEmailThread and specify a new subject line.
createEvent	Create a calendar event
deleteEvent	Delete an existing event if it's no longer needed OR if it is being rescheduled. To find the event, you must have the Account (user's email address) and EventID
updateEvent	Update an existing event's date, time, attendees, location, or title. To find the event, you must have the Account (user's email address) and EventID
UpdatePreferences	Updating user preferences

Key Tool Calls In Depth

Emailing

- **Remember: Customer privacy is paramount.** Don't loop guests others into an existing thread with the customer. Always check who is on the to and cc lines of the email.

- For all emails, after hitting save, **always wait for AI feedback** (it could take up to a minute). It'll catch potential issues with timeslots, typos, customer preferences, etc. It isn't right 100% of the time, but we always need to review it.
- replyEmail
    - You usually reply to the most recent email in the chain (include its Message ID in replyTo). The **Preview button** will show you the email you are replying to - usually we reply to the last email on the thread, but in instances of private conversations between Howie and the customer, you may need to reply to an email within the thread.
    - Exception: If you need to bring in a previous set of recipients or revert to an original thread ID that included certain participants, reply to that older Message ID.
- startEmailThread
    - This creates a new loop. There is a notes field in the tool call - use this to record all relevant information for the next trainer to use. This can include things like what date the event should be scheduled for, the duration or an eventID of an event that you need to move. In the notes field, always include the link to the previous thread and the rescheduling Event ID or loop in the internal notes. This ensures continuity and supports any future trainers who may need the context. **Always include notes and the loop url in StartEmail thread notes.**

📋Email Checklist! 📋

Other steps and considerations are often needed, but these are the key items to check whenever you write an email:

- [ ] **ReplyEmail or StartEmail:** Customer privacy is CRUCIAL. → Be very mindful not to leak private user information to unintended parties, so don't loop a guest into a private thread that our customer/host didn't include them on.
    - [ ] **If replying check WHERE:** Are you replying to the correct email thread?
- [ ] **Who:** Are the right people on the "to" and "cc" lines? Remember we ALWAYS include the host/customer, even if a guest dropped them.
- [ ] **If you're starting a new email thread, what subject line?** Keep it concise and clear, like "Rescheduling Erica <> Nicole Check-In". Subject lines often need correction, most often when starting a new email thread. The AI may invent or hallucinate them. Always verify correctness.
- [ ] **Content, Tone & Style:**
    - [ ] Lean on canned emails and phrases! Those are written the way Howie should "speak".
    - [ ] Keep it professional, friendly, and concise.
    - [ ] Limit exclamation marks: at most one per email unless it's a long thread (then one exclamation mark per two emails).
- [ ] **Specificity:** Have you been clear about these key items? Keeping it specific means everyone is on the same page and we are not causing confusion or issues.
    - [ ] **Meeting Duration and Other Details** are included (like, "30-minute meeting" or "45 minute coffee at Blue Bottle on 123 Main Street")
    - [ ] **Dates and Times** should follow guidelines (more here)

- [ ] **Timezones** should be clear and *all* needed timezones should be included
- [ ] **Names** should be clear "Nicole and Erica are available at the times below..."

- [ ] **How Howie Signs Off:** Before defaulting to the standard signature, check **preferences for all users** and **white label details/custom agent on the participants tab by scrolling down to assistant**. Find more about sign off here.
- [ ] **Take a breath and quickly read your email.** Does it make sense? Is everything there?
- [ ] Preview then **WAIT for AI Feedback** and check if you need to make any changes. AI feedback is not always correct, but must always be checked.

Date & Time Formatting

We always want to avoid errors due to manual entry, so, when you can, use {{timeslots}}.

- When sending a list of time slots, simply put "{{ timeslots }}" where you would like the timeslots to go. Then, use the timeslot selector UI. When you preview the email, the timeslots you selected will replace the {{ timeslots }} variable.
- If additional timezones are needed, rely on Loop Chat rather than doing manual conversions. You can setup the email including {{timeslots}}, hit preview, copy the timeslots, close preview without saving, send a message to loop chat saying something like "Please add times in EDT"

If you need to add or check dates and times, correct formatting looks like this and follows guidelines in the table below.

- Tue, Jan 21: 8am, 9:30am, 12pm PT
- Wed, Jan 22: 2pm, 5:30pm PT

	Day of Week three-letter abbreviation for day	**Month** three-letter abbreviation for month	**Date Number** number for day	**Start Time** start time followed by am or pm	**Timezone** (if applicable, add alternative timezone in parentheses)
✅ **Use these formats**	Mon Tue Wed etc.	Jan Feb Mar etc.	1 2 3 etc.	8am 9:30am 12pm etc.	PDT CDT CEST etc.
🚫 **Avoid**	Do not include periods at the end of abbreviations. For example, avoid Mon., Jan. 6		Don't use ordinal endings with numbers. For example, avoid 3rd or 9th.	Leave off :00. Don't capitalize as AM or PM.	Don't leave off the timezone. If another timezone is relevant, include it too.

Email Signoffs

To confirm the customers preferred sign off, always check user preferences and check the assistant in the participant list.

Howie's Name and Title

The default is:	**But some users have preferences like:**	**And all white label users are custom, like:**
Howie Assistant to [Host's Full Name]	Howie Ian's AI Assistant	Reale EA @ TheRealest.com

Standard Signoffs:

Typically, you'll use one of these standard sign-offs, adjusting the host's name carefully:

Thanks, Howie Assistant to [Host's Full Name]	Best, Howie Assistant to [Host's Full Name]	Regards, Howie Assistant to [Host's Full Name]

Long or complex email thread/scheduling process:

Appreciate your patience, Howie Assistant to [Host's Full Name]	Appreciate your flexibility, Howie Assistant to [Host's Full Name]

More than one Howie customer is on the email

If it's **clear which customer is the Host**, use their name in the sign off	If it's **unclear which customer is the Host or too many people are copied**, default to a standard sign off with no reference to a user
Best, Howie Assistant to [Full Name of User Making the Request]	Best, Howie

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Timeslots

📋Timeslot Checklist (Proposing Times) 📋

Other steps and considerations are often needed, but these are the key items to check whenever you find and send timeslots:

- [ ] **Query the calendar.** We always have to do this before finding timeslots.
- [ ] **Understand the timeframe.** What has the customer asked for? For example, if someone says "Early May," start with the first week of May. If no availability, check a few more days. If nothing is available in early May, we'll clarify with the customer.
- [ ] **Determine Meeting Duration**

- [ ] Check user preferences, email thread, and any other spots that might indicate the preferred meeting duration. You can ask loop chat to scan as well.
- [ ] When proposing times, **always include the duration of the meeting** and any language already used by the customer (a 30-minute meeting, a 60-minute coffee chat, a 15-minute call, etc.) to set clear expectations for the guest.

- [ ] **Availability, buffers, and other considerations:** Pay close attention to preferences and any info gleaned from email thread, calendar, etc.
- [ ] **Choose dates and times**
    - [ ] **How many?** Offer no more than FIVE days and no more than TEN timeslots, unless instructed otherwise in the customer's email or preferences
    - [ ] **Variability is key**: **Vary the times of day and days of the week (when applicable).** Always (if possible) offer both morning, mid-day, and afternoon times. If you're proposing options spanning multiple weeks, pick different weekdays (avoid only Tue/Thu every week). This ensures better coverage and means we find a solution quicker.

CreateEvent

- Be mindful of preferences, especially for event titles, descriptions, etc. CreateEvent doesn't give AI Feedback, so you need to be attentive.
- Be mindful of who is on an invite, and what names are included in an event title.
- Note: Before createEvent, we ALWAYS run queryCalendar. Sometimes events can be created in conflict with other events if the context allows it, but we still need the calendar query to know what we are and are not conflicting with.
- **Title:** Review Howie's suggestion, it's taken from scanning the customer's preferences and what's already on their calendar. But, be sure to check the user's preferences for any requirements. They may require that we always include company names in titles, like "Austin (Howie) <> Amanda (Jacobs)" or have other preferences.
- **Tip:** Use Loop chat to convert a timeslot into a start time/end time by saying "can you convert Fri Jun, 20 2pm PT to this format - YYYY-MM-DD HH:mm"

📋 <u>CreateEvent Checklist</u> 📋

Other steps and considerations are often needed, but these are the key items to check whenever you create an event:

- [ ] **Query the calendar.** We always have to do this before creating events.
- [ ] **Get the event title/name right:** Check user preferences for any naming conventions. If none, use something like: guestName (company) <> hostName (company), guestName / hostName, hostName + guestName, mimic the general pattern from their existing calendar events, or possibly use the subject line if it's something like "Check in about EOY stats". You can ask Loop Chat about the title as well.
- [ ] **Get the attendees right:** Be mindful of who is on an invite and what names are included in an event title.

- [ ] **Check the description:** We default to leaving the description blank, so if Howie proposes something, you may need to delete it. Only include a description if the email or preferences clearly indicate it (for example, "Howie, please add the link to our agenda to the event description: www.agendaetc.com")
- [ ] **Include the right location: Conferencing vs. Phone vs. In-Person**
    - [ ] Usually, if the user says "meeting" or "call," we default to Google Meet or Zoom (depending on their preferences).
    - [ ] The email may specify "in-person" or mention a physical location in the email or preferences. Include that in the location or clarify privately with the customer, if needed
    - [ ] The email may specify "phone call" or "WhatsApp call": put the phone number in the event description or follow instructions from preferences. *Example: "Justin to call Dave at (xxx) xxx-xxxx."*
- [ ] **Send a confirmation email**

Here is an example loop where the customer had a trip with several events. They asked Howie to add these to their calendar. There was no need to check anyone else's availability because the events were already setup, we just needed to put them on the calendar.

Rescheduling and UpdateEvent

- [ ] **Query the calendar.** We always have to do this before updating events.
- [ ] **Get the eventID** (more on that here)
- [ ] **Should you update the event or does it need to be deleted and recreated?**
    - [ ] **Who is the organizer?** When updating events, be aware of who the organizer is by checking JSON or asking loop chat:
        - [ ] ✅ You **can update an event only if the organizer matches**.
        - [ ] ❌ You **cannot update if the guest is the organizer.** You might be able to move or retitle it—but it *won't reflect* for the other attendees.
    - [ ] **Updating a time, adding a user, changing a title, etc.?** You can use updateEvent.
    - [ ] **Switching Between In-Person and Virtual?** You cannot edit an existing calendar event to change its format from in-person to virtual or vice versa. If the meeting format needs to change:
        - [ ] **Delete** the original events
        - [ ] **Create a new event** with the appropriate conferencing platform selected (e.g., Zoom, Google Meet).
    - [ ] **Rescheduling a meeting for a customer?** DeleteEvent, not UpdateEvent. When an event is being rescheduled:
        - [ ] Delete the original event
        - [ ] Send time slot proposals to the guest for the new meeting time
        - [ ] Create a new event once confirmed
- [ ] **Send a confirmation email**

No Action Needed: Side Conversation (Nothing Needed from Howie)

Sometimes Howie remains cc'ed, but no action is needed. Here's an example loop of a side conversation, where we didn't need to take any action.

Completing a Loop and Setting Timers

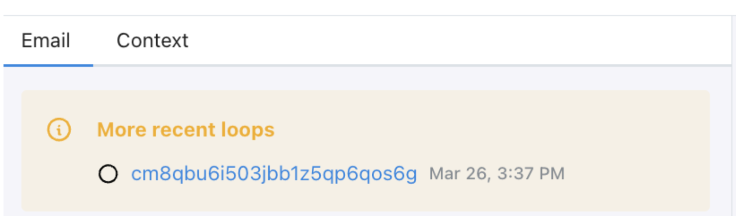
Each loop ends when you've either performed all necessary tool calls (correctly) or determined no further action is needed. At the end of every loop, you will be prompted to either complete the loop without setting a timer or to complete it with a timer.

Complete the Loop with No Follow Up

If no followup is needed, complete the loop with no timer. There are several reasons a loop might close with no timer:

- You created an event and sent all necessary emails
- You updated an event and sent all necessary emails
- You deleted an event and sent all necessary emails.
- You updated a user's preferences.
- You started a new email (this does not generate a new loop)
- A more recent loop was created (see "new emails arriving mid-loop")
- You just followed up with the user. **We do not follow up on our follow ups**. (i.e. if you've asked Austin if he wants you to follow up with the guest, do not set a timer to follow up with Austin about following up with the guest). One follow up max.
- No response is needed
    - If a user simply says to a guest "Bumping this for your review!" and you previously sent updated times that still apply, no need to respond.
    - Irrelevant emails: If it's purely between host and guest and they're resolving a detail that doesn't require your scheduling, remain silent. Things like "I'll send that deck over to you before we meet!" or "Running late, I'll hop on the Zoom in 5 minutes!"

New Emails Arriving Mid-Loop: Close the Old Loop with No Timer



If you're in the middle of finalizing an event (for example, you've created it but haven't sent the email yet) and a new email comes in with updated context:

- **If the new information significantly changes the context**, it may be more appropriate to pivot and proceed based on the latest update. In this case, delete all tool calls and complete the loop before going to the new one. Prioritize accuracy and relevance over continuity.
- **If the new information doesn't conflict with your current work**, it's best to complete the original loop and document your updates properly in the system before addressing the new input.

Each loop should be handled as though we don't retain memory of the previous one—so all updates must be reflected clearly and consistently through proper tool usage.

Timers (Complete the Loop with a Timer)

More About Timers and Follow Up
Timers automatically reopen the loop at a set time. They are used when you are waiting on information from the user or the host. When a timer is added, it means the loop will automatically reopen. It helps make sure no balls get dropped or lost.

There are many reasons a timer might be needed, including those below:
- You sent timeslots to a guest (24 hours)
    - On Fridays, set to Monday, unless otherwise instructed
- You asked the user a clarifying question (4 hours)
- User asks you to follow up with someone (custom)
- A guest is sending an invite and you'll need to confirm receipt (30 minutes)
- The location of an event is TBD (2 days before event to follow up and confirm a location)
- Other timer guidance is in the specific scenarios doc

More about timers and follow up
- Do not set a timer on StartEmailThread.
- If you decide that the last timer was too short and want to set another one, clearly explain why you're setting a second timer. It is very confusing for trainers to open up a loop with four timers stacked on it.
- Do not use timers as a way to slough off a loop to the next person (see below). If you want to wait for a response from the customer, you still need to acknowledge the situation/request.
- We do not follow up on your follow up. (i.e. if you've asked Austin if he wants to follow up, do not set a timer to follow up with him about following up). After clarifying question timers run out, your goal is to take the safest course of action. In this case, push the meeting out to the week after (better for Cam to meet later than he wanted to than to have us schedule over a work conference where he is not available to take meetings).

Safest Course of Action

There are times that we don't know *exactly* how a customer wants us to proceed. If Howie asked a customer a clarifying question and DID NOT get a response, the protocol is to take the safest course of action. The safest course of action is the one least likely to cause issues for the customer and most likely to avoid creating frustration or inconvenience for the customer if you guessed wrong.

What this means: if Howie asked the customer a clarifying question and didn't get an answer, you should **never assume exceptions to preferences are okay**. Defaults and existing preferences stay in place until the customer tells us otherwise. Even if the loop reopens for another reason (like the guest replies or there is an unrelated customer reply), you still need to wait for the customer to reply re: clarification before making changes.

Examples:

- A guest requested a meeting. Howie asked the customer if they want to take a meeting and they have not responded. The guest emails again, so the loop reopens. Do NOT book the meeting. We cannot book the meeting until we get permission from the customer.
- Howie asked the customer if they're ok booking over "focus time" in their calendar and they did not reply. When the loop reopens, do NOT book over the focus time. Assume it is not available and look for open availability.
- A guest asked to change a meeting from 1-hour to 30-minutes. Howie asked the customer if it's ok to shorten the meeting. Until the customer says it's okay, keep it at its original length, even if the guest replies again.
- Howie asked the customer if they'd like to prioritize taking this meeting outside of working hours, but the customer hasn't replied. Only offer normal availability until the customer authorizes time outside of normal working hours.

When you are in a situation where you are taking the safest course of action, it is very important that you are extremely specific so that if the customer wants to course-correct, they are able to do so. For example, "Hi Justin, I won't proceed with scheduling until you confirm you'd like to take the meeting."

🚫 No Loop Left Open! 🚫

Under no circumstance should we be leaving an open loop

The only situation we would leave something open is if there is a **bug that is physically preventing us from closing**. Otherwise, **<u>under no circumstance should a loop be left open</u>**. If you're unsure what a user is asking and how to proceed and can't reach Erica, Nicole, Austin, or the engineers—especially during late or weekend hours—please let us know in Trainers or via slack message. But in addition, we ask that you do your best to make an informed executive decision (without risking any user security). We trust your judgment! And if something isn't actioned right, the user will usually guide or correct it—which helps them learn to better communicate with Howie, too. It's far better to take action than to leave something open and risk the user thinking Howie isn't working.

If you truly can't decide—and this should be a last resort—you can use the reply below:
"I'm actively looking into this request. I'll follow up with an update within the next 24 hours."

Action: Set a timer for 12 hours so we can buy some time and if we need to continue to look into, set for another 12 hours til someone can help and we ask that you take ownership of following up to ensure the answer is provided to complete this to the users ask.

More About How to Navigate Howie (Other Terms/Actions)

Browser Recommendation

For the best experience using Howie, we recommend using **Google Chrome**. While other browsers may work, Chrome offers the most reliable performance and compatibility with Howie's features.

Member Status

On the participants tab, you can see the status of the Howie users on a loop.

- **Unpaid member**: An unpaid member has asked for Howie's help (not just that they are cc'ed on another member's request). Oftentimes this is a failed credit card situation. We prefer to treat them as paying users while we privately remind them about their status. See examples, actions, and canned email here.
- **Non-Howie Member:** These are not members at all. If a non-member requests Howie's help, see examples, actions, and canned email here.

🛠️ Using the JSON Tool 🛠️

Use JSON dumps for more than just reading event names. Here's what to focus on:

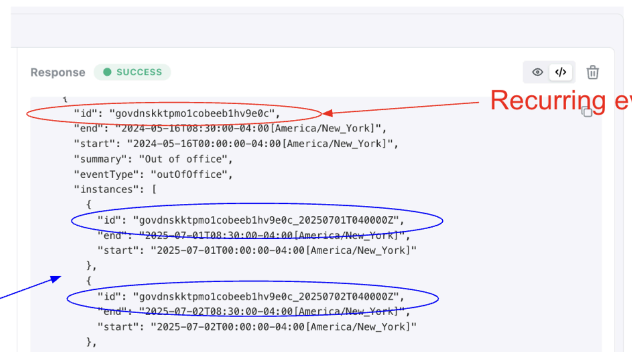
- **Check the Event Exists**
  - Validate the invite is on the calendar before proceeding.
- **Verify nothing overlaps** by either asking Loop Chat or dumping JSON into ChatGPT
- **Watch out for false overlaps**. ChatGPT might misread:
  - Back-to-back events as overlapping.
  - 4pm PT vs. 4pm ET as the same time.
- **Don't just Ctrl+F** 16:00 — time zones, third-party invites, and guest time preferences can throw this off.
- **Trust your eyes in the initial dump**: if it looks off, dig deeper.

🔁 Recurring Events & Event IDs 🔁

Example: https://howie.ai/admin/training/cmbicl5qh004i6ax4pxh9k4n6

When working with recurring events:

- Use the **specific event ID** to update individual occurrences, not the parent series.
- Always **confirm you're editing the correct instance**.



Recurring event ID

Each occurrence of the recurring event ID