CRA Notes

Section for any processing notes necessary for CRAs
Suggest Edits

Timezone vs Time Zone

We should all be using "time zone" when adjusting a template. While both are grammatically correct, it looks incorrect when we use it two ways in the same thread.

First Day of the Week

Clara recognizes Monday as the first day of the week. If a customer asks to change this, please loop them in to Support, as this is not a feature we currently support.

Customers that should be escalated to Admin

- Josh (Clara Labs)
- Chris Mele (Software Pricing Partners)
- Martin/Martin LaGod (ZCS Farms)

Customers that should be escalated to Admin for Reschedules (Rolling Dots/Sticky Invite bug)

Please note, this is not a comprehensive list. If you come across the Times Step rolling dots issue and you need to reschedule, please escalate to Admin

- Calvin (Six Feet Up)
- Arthur Fratamico (Radiant Biotheraputics)

Special Customer Notes

- Daven Michaels has opted to change their time zone to EDT/EST so that all times are sent in that time zone to participants. In-person locations remain in AST (Puerto Rico) and do not need to be sent to Support.

Bugs!

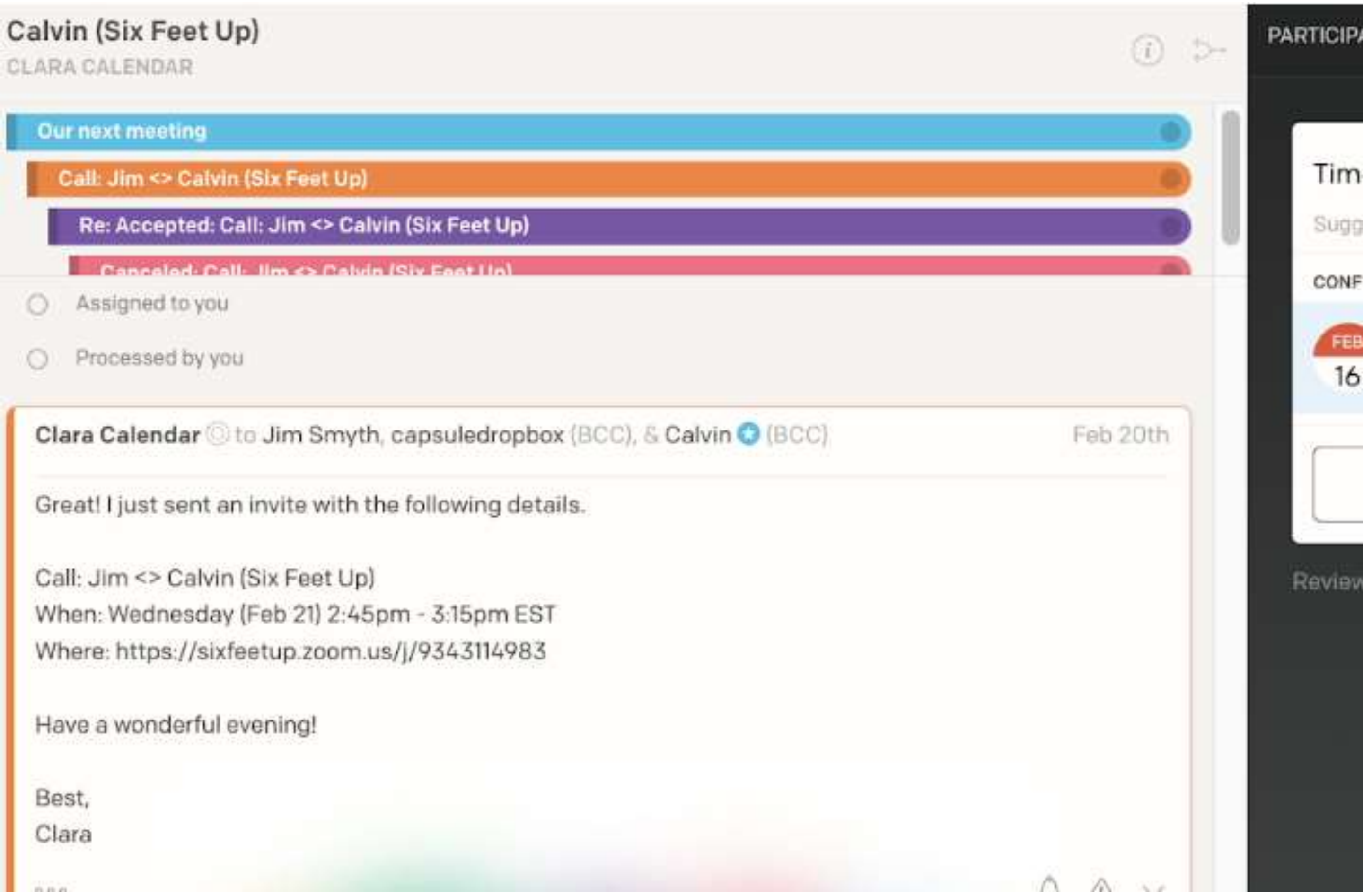
Two Default Bug/No Defaults Bug

If a customer has two defaults or no defaults at all, please escalate to Admin instead of looping in Support

Times Step/Rescheduling (Sticky invite) Bug

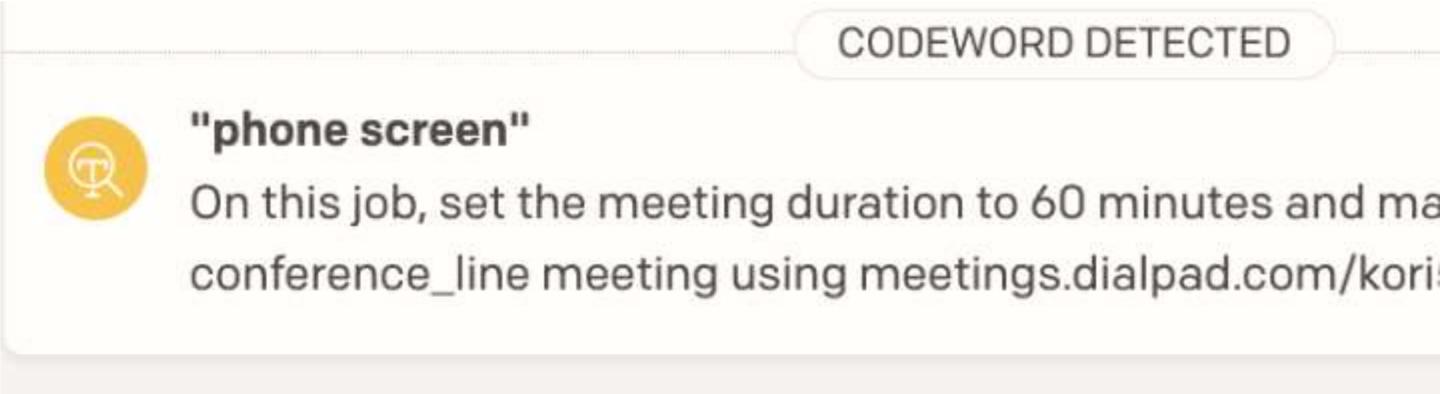
Some customers have rolling dots in the Times step once a time is confirmed. These are often the same jobs where the event will stick in Exo, even though it's been removed. The easiest way to avoid this issue is to escalate the job to Admin if it needs to be rescheduled. We can manually remove the invite outside of Exo, which will avoid the bug all together.

Remember: Rolling dots in the Times Step and need to reschedule? Escalate to Admin to be removed first :)



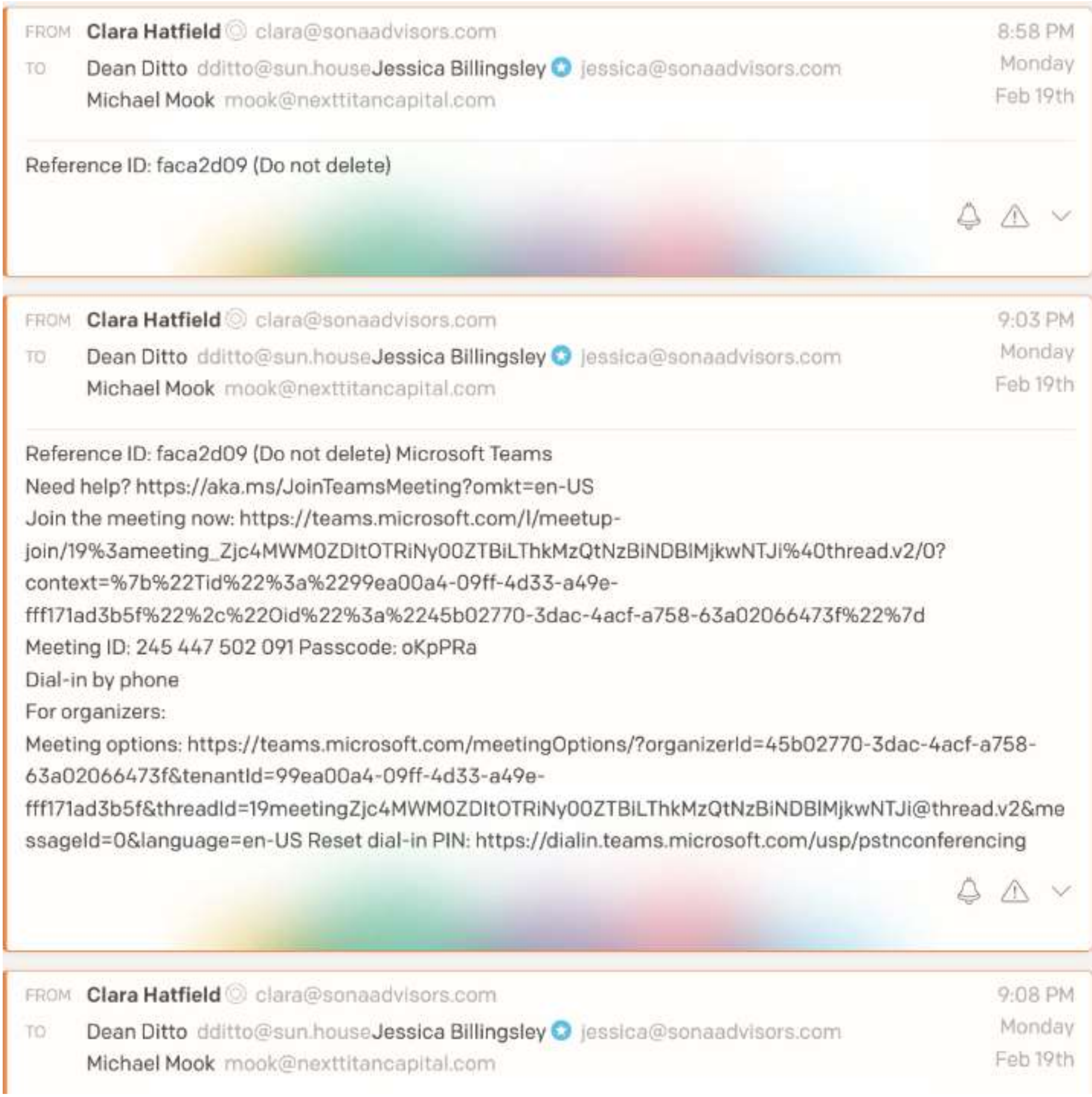
Codeword Bug

If a codeword is present with virtual details, it will create an error code when submitting. As a workaround, you can copy and paste the link in to a Custom channel. This will remove the error code and allow you to submit the job."



Fixed, but to look out for...

Recurring (Clara sent emails every 5 minutes, only on Teams dynamic links)


FROM Clara Hatfield clara@sonaadvisors.com 8:58 PM Monday Feb 19th

TO Dean Ditto dditto@sun.house Jessica Billingsley jessica@sonaadvisors.com Michael Mook mook@nexttitancapital.com

Reference ID: faca2d09 (Do not delete)

FROM Clara Hatfield clara@sonaadvisors.com 9:03 PM Monday Feb 19th

TO Dean Ditto dditto@sun.house Jessica Billingsley jessica@sonaadvisors.com Michael Mook mook@nexttitancapital.com

Reference ID: faca2d09 (Do not delete) Microsoft Teams
Need help? https://aka.ms/JoinTeamsMeeting?omkt=en-US
Join the meeting now: https://teams.microsoft.com/l/meetup-join/19%3ameeting_Zjc4MWM0ZDItOTRiNy00ZTBiLThkMzQtNzBiNDBlMjkwNTJi%40thread.v2/0?context=%7b%22Tid%22%3a%2299ea00a4-09ff-4d33-a49e-fff171ad3b5f%22%2c%22Oid%22%3a%2245b02770-3dac-4acf-a758-63a02066473f%22%7d
Meeting ID: 245 447 502 091 Passcode: oKpPRa
Dial-in by phone
For organizers:
Meeting options: https://teams.microsoft.com/meetingOptions/?organizerId=45b02770-3dac-4acf-a758-63a02066473f&tenantId=99ea00a4-09ff-4d33-a49e-fff171ad3b5f&threadId=19meetingZjc4MWM0ZDItOTRiNy00ZTBiLThkMzQtNzBiNDBlMjkwNTJi@thread.v2&messageId=0&language=en-US Reset dial-in PIN: https://dialin.teams.microsoft.com/usp/pstnconferencing

FROM Clara Hatfield clara@sonaadvisors.com 9:08 PM Monday Feb 19th

TO Dean Ditto dditto@sun.house Jessica Billingsley jessica@sonaadvisors.com Michael Mook mook@nexttitancapital.com

Anatomy of Exo

Suggest Edits

Welcome to Exo!

Here, you will learn the different parts and functions in Clara's proprietary software, Exo. This section will outline the basics of what you need to know to process jobs successfully.

Dictionary

CRAs use different language that may be confusing when first learning the system. The following terms are most often used. We have linked helpful articles for reference.

Accepted Invite: When a customer or participant confirms replies "yes" to the meeting through the invite
Add Mistakes on Flow ('m'): Button that allows you to mark mistakes on that specific flow of Exo for the previous session
ADEs: All Day Events; these are found as banners across the top of the customer's calendar on certain days and can be ignored unless they say "Travel" (for in-person meetings), or "DNS" or "Do Not Schedule" (for all meetings)
Archive: Process job with no action
Auto-Decline: An invitation that is automatically declined by the customer/participant's calendar
Buffer: The amount of time that a customer would prefer open between events on their calendar; this preference is set by the customer
Buffer-time Conflict: When a proposed event partially or entirely conflicts with the the customer's preferred buffer time
Bulk Cancellation: When a customer requests that all of their events for a certain time frame (today, next week, etc) be canceled
"Busy" block: An event on the calendar that is blank when clicked on; only says "Busy"
Calendly: An online calendar that a participant can send to Clara to confirm a time without emailing back and forth. The CRA should open the link, change the time zone to the customer's and select an available time, based on the customer's availability. (Note: Other calendar links are supported by Clara as long as you can see the calendar.)
Channel Step: The section in Exo where the location of the event and duration are set
Channel: A means of connecting, either virtually or in person; how participants and customers request to meet up
Clara Voice/Style: The format and verbiage that is used in the Clara templates and CRAs are expected to follow. You should mimic this format whenever editing a template or creating a custom reply
Clara-to-Clara scheduling: When 2 or more customers have different Claras and are trying to schedule with each other, to confirm a time for their respective customers
Codeword: A word or phrase that a customer uses to trigger additional instructions that only Clara can see in the thread

Colleague: A person who works at the same company as a customer and whose calendar Clara can see; colleagues have a hollow circle next to their name in the Participant step

Composer Step: The flow in Exo where emails are composed using templates

Conference Rooms: An optional setting that populates as a separate flow for a Clara to set a specific conference room, based on the customer's instructions

Conflict: A currently scheduled event that partially or entirely conflicts with the event you are trying to schedule

Contact Permissions: Specify individual people or email addresses who have either schedule or initiate privileges

Coordinator: Either a Clara or another person who is scheduling on behalf of someone else

Copy (aka "Split"): Copy one or more specific emails from the job you're assigned to and paste them in to one or more different jobs; all emails remain in their original job IDs

Custom Location: Powered by Google, this option allows a CRA to search for a location if only a location name is provided

Customer Support: A team of Clara employees who help to answer customer questions and update some settings

Customer: A person who is paying to use Clara's scheduling services; customers have a blue circle/white star next to their name

Declined Invite: When a customer or participant replies "no" to the meeting through the invite

Default: The option that the customer would prefer, unless otherwise instructed in email context; these are preset by the customer and are noted with a green (DEFAULT) notice next to the option

DNS: Do Not Schedule. Clara is not to suggest any times on days that have the ADE "DNS"

Domain permissions: The email domains of all people who have either schedule or initiate privileges.

Doodle form: An online scheduling tool that Clara does not support

Down carrot: The clickable menu option on the bottom right corner of an email that allows you to copy ONLY that specific message to a different thread

Duration: Amount of time a customer/participant would like to meet

Ellipses: Three dots in the bottom left corner of an email in a thread that will expand the thread out, so you can see what someone is replying to

Empty Subject/Subject Heading: When a title needs to be added, because a new email thread has been started within the job (Often, a customer CC's Clara and asks to schedule with email@email.com. When Clara reaches out to this new person, it creates a new email thread, without forwarding any prior context.)

Escalate: Passing a job to an "Escalations CRA," who has a higher qualification and more time to complete more complicated tasks
Event: A meeting that is currently scheduled on a customer's calendar
Event Description: An editable section in the Event Step where details for the meeting can be annotated
Event Step: The flow in Exo where the title of an event is edited or a description is added
Event Title: The name of the event that is being scheduled. It can be edited in the Event Step in Exo
Finalized Time/Confirmed Time: The time that every person who is joining the meeting has agreed to/confirmed their availability for
Flight Buffer: The two hours before and after a scheduled flight that Clara avoids scheduling. Note: This buffer does not appear on the calendar and needs to be calculated by the CRA looking at the calendar to schedule when manually selecting times
Flow (aka Steps): Sections of Exo where contact data (e.g., name, phone number), meeting parameters (e.g., channel, duration), and other info can be annotated (i.e., selected or manually entered) for the purpose of creating a calendar invite and/or sending an email
Follow-up Cycle: The sequence of email templates that need to be sent
Following up: When a snooze button expires, the job is returned to the queue and action needs to be taken
Hold: A temporary event that a CRA can place on a customer's calendar to reserve a timeslot. Note: Only 1 hold can be placed per job
Inactive Customer: Someone who used to be a customer, but is no longer. Signified by a greyed out circle with a star inside. Often, their PMTs can still be seen in the Times Step, but can be ignored for the sake of scheduling.
Initiate Permissions: Those permitted to request that Clara schedule a meeting between a customer and anyone else, including themselves
Inner circle: A list of specific email addresses (with "contact permission") or general email domains (with "domain permission") that a customer has allowed to initiate or schedule meetings (See: Initiate Permissions and Schedule Permissions)
Internal communication: The back and forth between the customer and Clara, without any participant involvement. Note: If a pop-up notifies you that you are forwarding internal communication, please verify all persons in the "TO" field and on CC. If they are not customer/support, please remove them from the email.)
Internal meetings: An event the customer puts on their calendar as a reminder, or a meeting with just their work colleagues. These events will appear transparent in Exo
Internal Server Error: Red pop up message that notifies you that something has created an error in that job

Invite: A calendar invite that Clara (or the participant) manages (e.g., "Thanks for sending the calendar invite", "I've just sent a calendar invite", "I've removed the calendar invite", etc.)
Job ID: The URL with a unique number that will open a specific request, with one or more related email threads
Meeting Creator: In the Participant Step, where all participants/those who request a copy of the invitation are added
Mistake: When a previous CRA makes an error on a thread that needs to be marked. These are reviewed by the CRA Support team and a review is sent out every Tuesday
Move (aka "Merge"): Move all emails of the job to which you're assigned to a different job; the moved emails assume the other job's ID
NFA: No further action
NJA: No jobs available
Onboarding: The process of signing up with the system/training
Participant: Anyone other than the customer who will attend the meeting
Participants Step: The flow in Exo where Participants or people who would like to receive the invite are added
PMTs: Preferred Meeting Times, which are set by the customer and indicated on their calendar as green blocks
Recommended Suggested Times: The times that Worker Bee finds open on the customer's calendar. These times should ALWAYS be double checked for accuracy
Recurring Event/Call: A event that shows on a customer's calendar that repeats (Every week, every other week, etc). We don't support scheduling new recurring meetings and should be escalated to Admin for declines of current recurring meetings
Reminders: An event a CRA can create to have the job reopen on a certain date (Note: A certain time cannot be guaranteed)
Reschedule: When a participant declines before the event was supposed to occur or the customer requests to reschedule and the CRA removes the previous confirmed time from the customer's calendar and suggests new times
Review Progress ('p'): Button that allows you to review the edits that you've completed so far in your current session of the job you're assigned to
Review Screen: The flow in Exo where any edits you made in Exo are to be reviewed before submitting
Schedule Permissions: Those permitted to request that Clara schedule a meeting between a customer and themselves only
Snooze: A timer that reopens the job at a predetermined time and date
Templates: Pre-loaded wording for different scenarios that CRAs send to participants/customers to aid in scheduling
Tentative: When a customer or participant replies "maybe" to the meeting through the invite

Times Step: The section in Exo where times are selected from the customer's calendar, confirmed or rescheduled
Times: Options on the customer's calendar that are open and within any set parameters (requested time frame, buffer preference, etc); A time that the customer/participants will meet
Travel Time Buffer: The amount of time a CRA should leave open between in-person meetings, often depicted by a pink block of time; how much time a customer may need to get from point A to point B.
Travel-time Conflict: When a proposed in-person event time does not allow the customer enough time to travel to or from the event
Updated Invite: An invite sent when there is a change (duration, time, etc) and a CRA needs to notify participants using a specific template
Worker Bee: An automated bot (with a bee icon) that sometimes suggests a meeting duration, meeting time, and/or email template; suggestions must always be double-checked for accuracy before being selected

Anatomy of Exo

This section will point out key items you'll need to successfully complete the job. All jobs start out the same way and look like the following:

exo.api.claralabs.com/jobs/71947

Robert Plant (Clara Labs)

CLARA

Re: Congrats, man!

Robert Plant to Lucas Potter & Clara (CC)

(CRAs, please escalate this up to Admin)

Thanks! Things have been wild recently, but would love to find a chance to c

Clara, can you help find a time for Lucas and I to connect?

PREVIOUS MESSAGE CONTEXT

On Fri, Oct 15, 2021 at 5:49 PM Lucas Potter <lucaspotter621@gmail.com

Hi Robert!

I saw your recent post on LinkedIn and wanted to reach out and say congr
Would love to catch up soon if you're free.

Lucas Potter
Horcrux United, Inc.
677-988-3454
Boston, MA

Initial Meeting Creator, before the job is set up

Header

The following are Exo pieces that can be found at the top left side of Exo, before the emails begin.

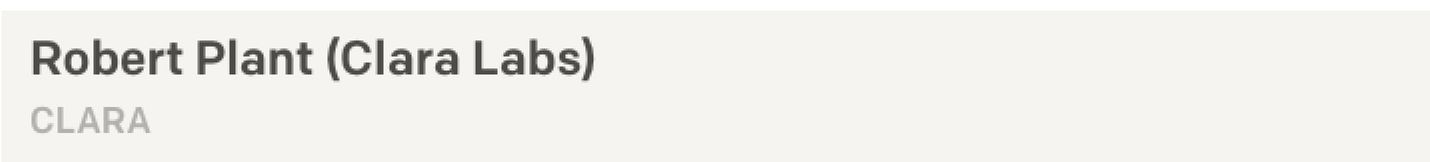
Job ID

The Job ID is a unique number located in the URL that is assigned to the thread. It can be found at the top of the page, like any web address.

Each job is assigned a unique number. Only one meeting can be created for each URL.

Customer Information Box

Next, let's take a look at the Customer Information Box. This is designated by a grey box on the top left side of the screen. Here, you will find email addresses, names and companies, as well as the context of the emails. The top box is where you will find the customer's name, company and the name of their Clara. Customers can sometimes change the name of their Clara to reflect their company. In the example below, this customer's name is Robert Plant and their company is Clara Labs. You can see that their Clara has not changed names.



This is always formatted by Customer Name (Customer's company); Clara's name below

To the right of the customer's name are the Information and Merge buttons.

Information Button: The Information button allows the CRA to see if the job has been split. Any notes left by the CRA who split the job will appear here. Instructions on how to split a job and the correct verbiage can be found here.

Merge Button: The Merge button allows you to Merge this Job ID with another. Instructions on how to do so can be found here.

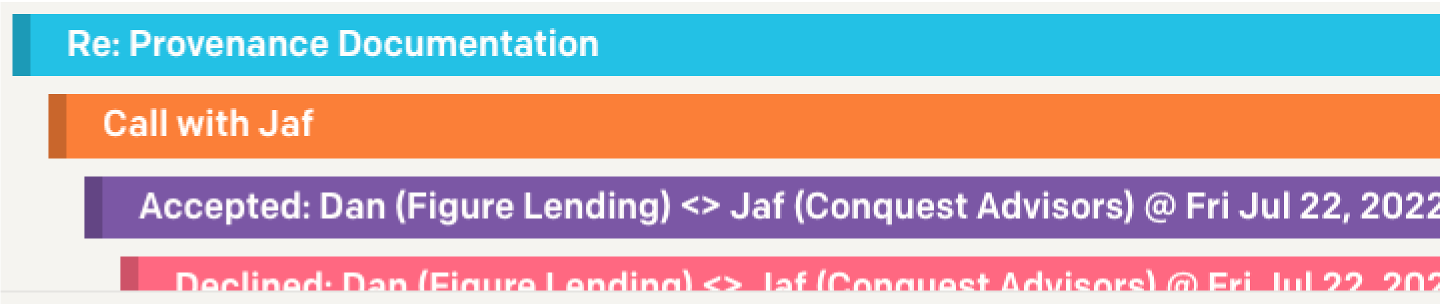
Reminder:
Merging jobs moves all emails to one Job ID.

Subject Line

The section below the customer’s name is where you will find the Subject line of the email thread.

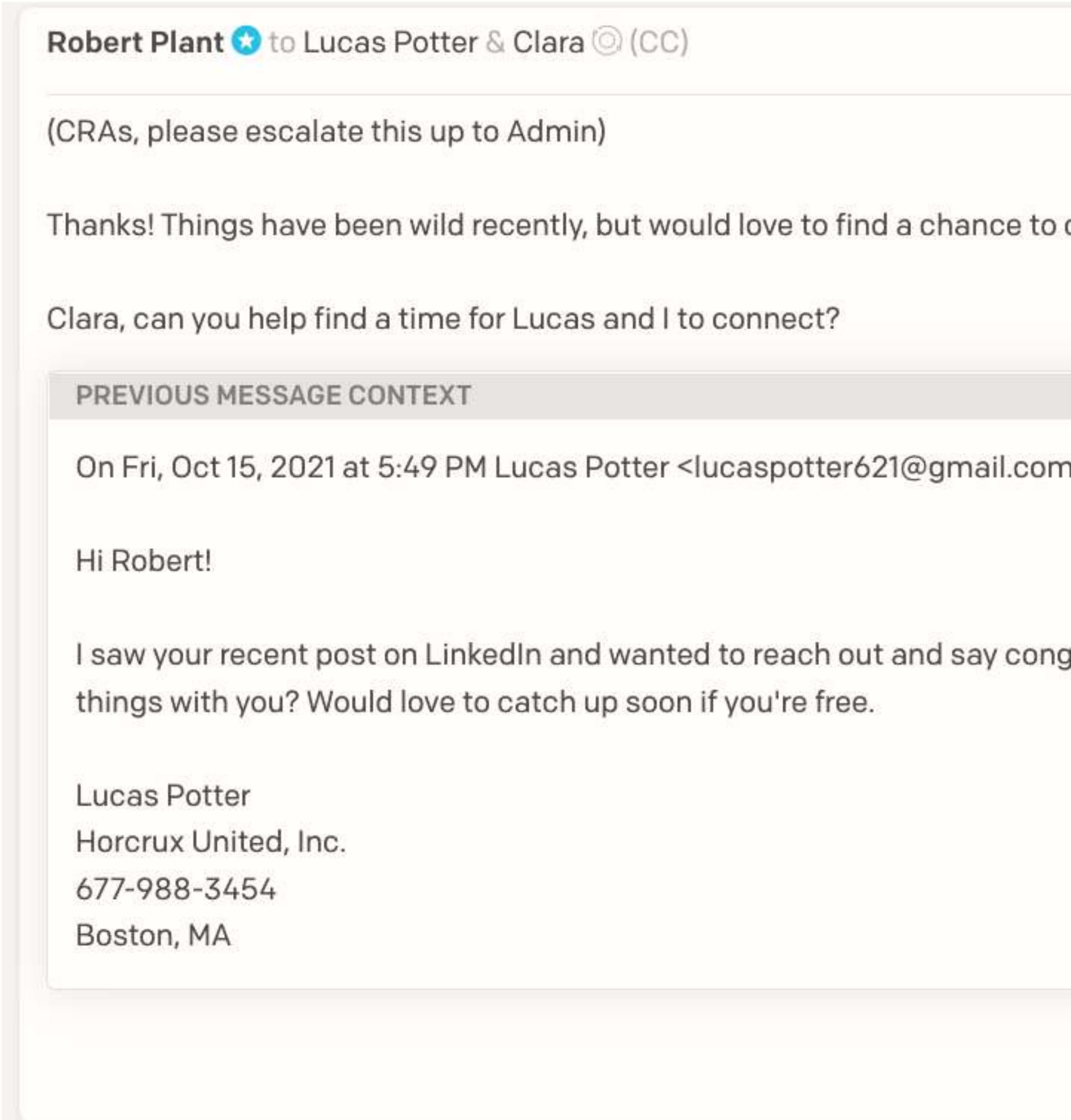
Note: Sometimes, companies and full names can be found in the Subject Line. Please always check here for annotation information.

Sometimes, multiple threads are merged into one, due to participant sent invites, declines, etc. This will appear as different colored subject lines. You can toggle these on and off in the thread to see which emails responded to which thread, like below:



Email Thread

The section below is known as the email thread. This is where the context of the emails sent and received will be. The customer (noted by the blue circle and white star) and any other participants that are CC’d will be listed. The customer’s Clara will be noted with the Clara symbol.


Robert Plant to Lucas Potter & Clara (CC)

(CRAs, please escalate this up to Admin)

Thanks! Things have been wild recently, but would love to find a chance to c

Clara, can you help find a time for Lucas and I to connect?

PREVIOUS MESSAGE CONTEXT

On Fri, Oct 15, 2021 at 5:49 PM Lucas Potter <lucaspotter621@gmail.com

Hi Robert!

I saw your recent post on LinkedIn and wanted to reach out and say cong
things with you? Would love to catch up soon if you're free.

Lucas Potter
Horcrux United, Inc.
677-988-3454
Boston, MA

The date the email was sent will be in the top right hand corner and if clicked on, will show what time the email was sent, in the customer's time zone *(If the job has not been set up yet, times may appear in your time zone*). This appears on each email and can be helpful when trying to determine next steps in some scenarios.

The customer’s email to Clara will be below. This is where you will find what type of action the customer is requesting you to take.

Previous Message Context

Previous Message Context is where you will find any email correspondence that took place before Clara was looped in. This often holds important information that Clara needs to annotate (names, email addresses, duration, availability, etc). Also note that a participant’s name and email address is present at the top and throughout the email context. Information present in context should be annotated and utilized throughout the flows.

Snooze

In the bottom right hand corner of each email, you will find a bell button and a down carrot button. The bell is known in Exo as the snooze button. This allows a CRA to set a timer on any email that would need to be followed up on. If no one responds to the email (which would automatically reopen the job), then the snooze will go off and the job will be placed in the queue automatically.

! □

Snoozes can only be edited in the Composer Step

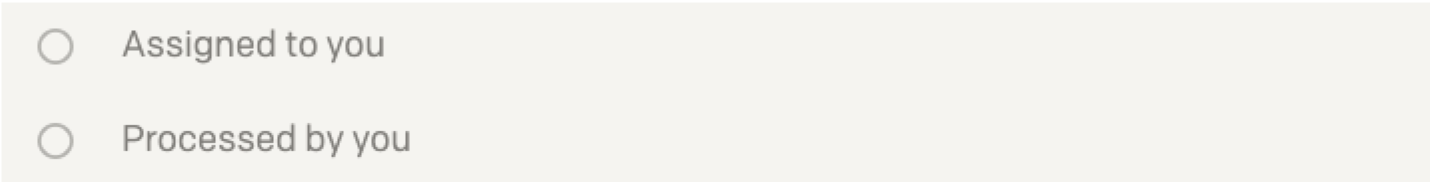
Remember, you can only add, remove or edit a Snooze in the Composer Step. A pop-up will remind you how long the snooze is set for after hit the Submit button. If the date does not match with the snooze you're adding, there may be an old snooze present somewhere in the thread. Submitting with an old snooze not removed or no snooze (When one is necessary) is considered a mistake.

Down Carrot for Copying A Message

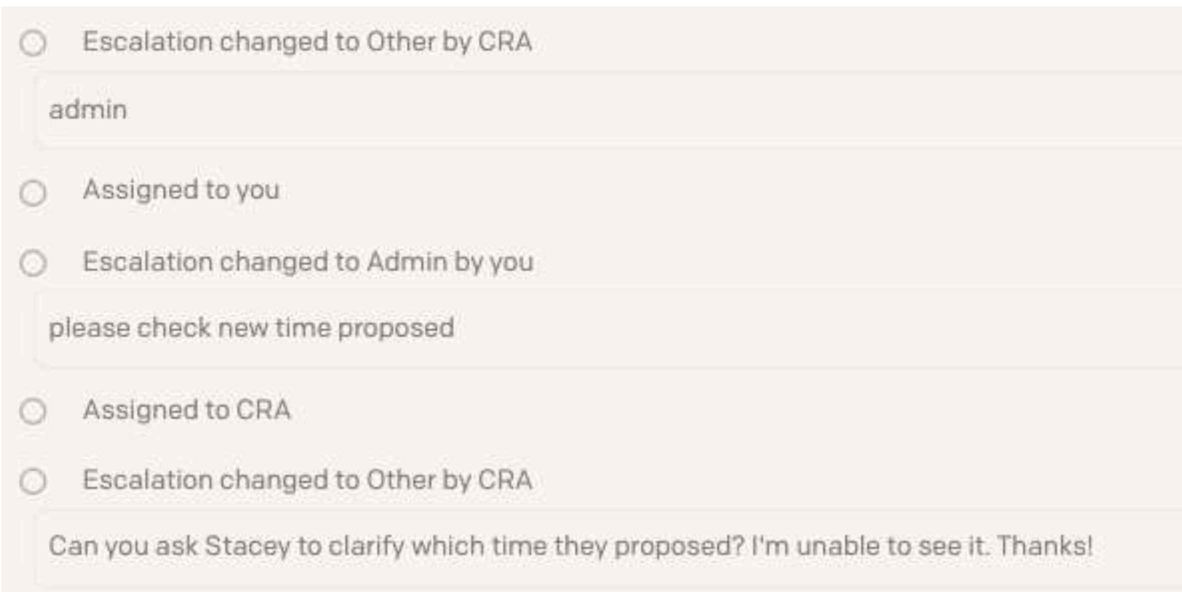
The down carrot option allows a CRA to copy that specific email to another thread. This will not merge the whole thread into another, only place a copy of that specific email in that thread’s timeline. This will also place the Job ID number in the bottom right corner of the email in each thread.

Admin Notes

In all threads, below each email, you will see annotations or notes in the grey area. Often, these are just automatically updated by the system, when a job is merged or assigned and look similar to below:



However, sometimes, a CRA has a question about a particular job and needs help. Here is where you will find the questions and answers to their escalation notes. It is very important to read these notes, as they may have information that you will need to process the job. This is why detailed escalation notes are required of every CRA.



Detailed Admin Notes help other Escalation CRAs and Admins know where the confusion is, so they can move the job along more quickly.

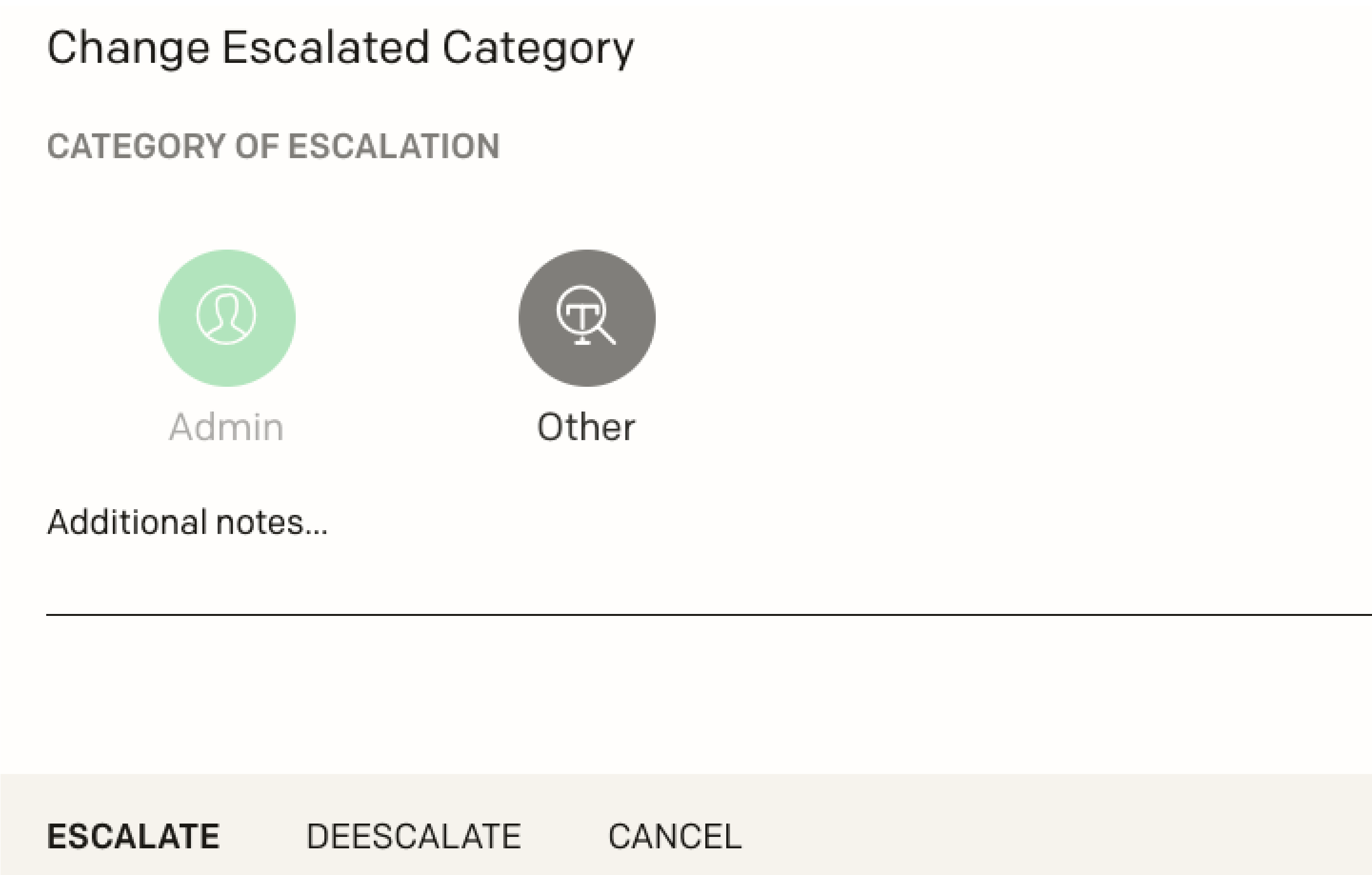
Timer

At the very bottom of the left side of the Exo screen is where you will find your timer and escalation button:

Regular CRAs have 8 minutes to complete each job. Escalation CRAs are given 15 minutes, due to escalated jobs having a higher level of difficulty.

Escalation Button

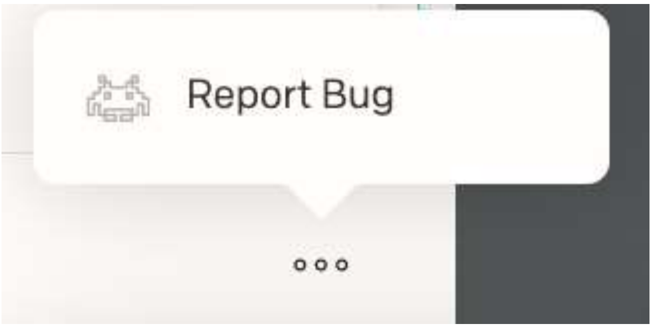
The Escalation button is in the middle of this section and allows you to reassign a more difficult job to an Escalations CRA or Admin.



When escalating, you are given a notes section. Detailed notes of why you are escalating the job are required of every CRA. "Not sure how to proceed" or "Please handle" are unacceptable reasons, since they do not tell the next person where the confusion or problem is. Once a note is completed, you can use the "Escalate job" button and it will return you to the Exo Home screen, where you can choose to select another job. For more information on Escalating, [check out this Escalations article](#)

Reporting Bugs

The last section is an ellipses for reporting bugs.



If a red error code pop up is blocking you from moving forward with a job, you may use this button to report the bug. Please include the error code included on the pop up, as well as which flow the error occurred in. For more clarification, check out this article.

Copy and Merge

Suggest Edits

Sometimes, you will receive one or more emails that could be entirely related to another job or could be relevant to multiple jobs. These emails need to be either merged or copied, respectively.

There are three functions you will become familiar with:

Merge thread to existing job

Copy message to existing job

Copy message to new job

Think of it like this:

- To “merge” means that all messages from one job — say, Job A — will be merged into another job — say, Job B. Job A will no longer exist, and Job B will retain its original Job ID and contain both its original emails and those of Job A.
- To “copy” means that only one or more specific emails from Job A will be copied to one or more other jobs, existing and/or new. For example, an email from Job A can be copied onto Jobs B, C and D — which could be a

combination of existing jobs and/or new jobs. In the end, all jobs retain their unique job ID. (It’s like a photo copy going into a specific folder, but the original remains).

Merge current job to an existing job

This needs to be done when you're assigned to a job that cannot stand alone and belongs to an existing job. The email(s) in the job you're assigned to entirely relate to another request that has either already been scheduled or is still in the process of being scheduled. **Note: Merging a thread to an existing job will combine the two together. If you’re not completely sure the message belongs with the existing job, please escalate to confirm.**

For example, you're assigned to a request where someone is responding to Clara suggested times and the Meeting Creator isn't set up:

Unknown Customer

CLARA

Interview with Roger Waters

Dustin Dobbs to Clara

Hey Clara!

I can do any of those times. Just let me know what works best for Roger.

Have a great afternoon and I hope to hear from you soon.

-Dusty

Assigned to Prediction Automation

Assigned to you

Or, a customer requests to reschedule an event:

Robert Plant (Clara Labs)

CLARA

Reschedule December Chat

Robert Plant to Candace Bright & Clara

(CRAs, please escalate up to Admin.)

Hi Clara,

You scheduled a chat for Candace and me, I believe slated for December 2
reschedule that for early January?

Assigned to Prediction Automation

Assigned to Mark Jabay

Escalation changed to Admin by Mark Jabay

Holding in Admin

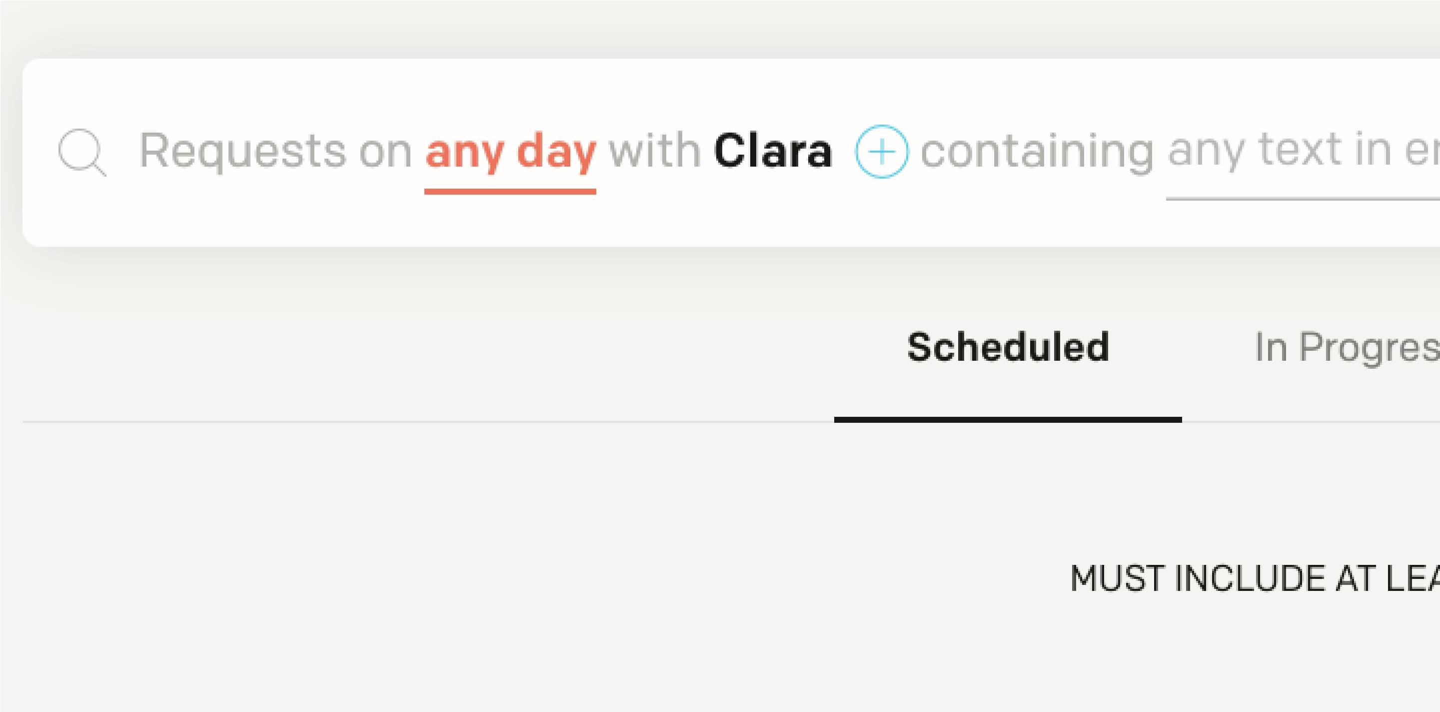
Assigned to Cat Moore

This likely means we've been scheduling this elsewhere and we need to merge that thread into an existing one. **When in doubt, please escalate.**

How to merge a job into an existing job

Below are the step by step instructions on how to merge a job to an existing request:

1. Read through the job you're assigned to for context. If it's possible that it's completely related to another job but is not a new request, click on "Move to Existing Job" or click on the move icon in the top middle of the screen. Exo will erase any work you've done in the Meeting Creator when you go to the merge screen, so you'll want to check if the job should be merged in to another job ***before*** setting up a new request.
2. To search for related jobs, you can filter using email addresses. To do this, click on the blue "+" icon and click on the email address of the person you'd like to search for. If the person's email address does not appear (they must be CC'd on the email you've received for it to appear), you can also choose Clara's email address to open up the search to any email that the assigned Clara assistant has sent.
    - If you're still unable to find the related job, you can also search by context using the blank field to the right of the blue "+" icon. For example, if the customer is asking about the status of the meeting with Jane Smith, you can type "Jane Smith" in that field and search from there.



3. The search results are categorized as (pictured above):

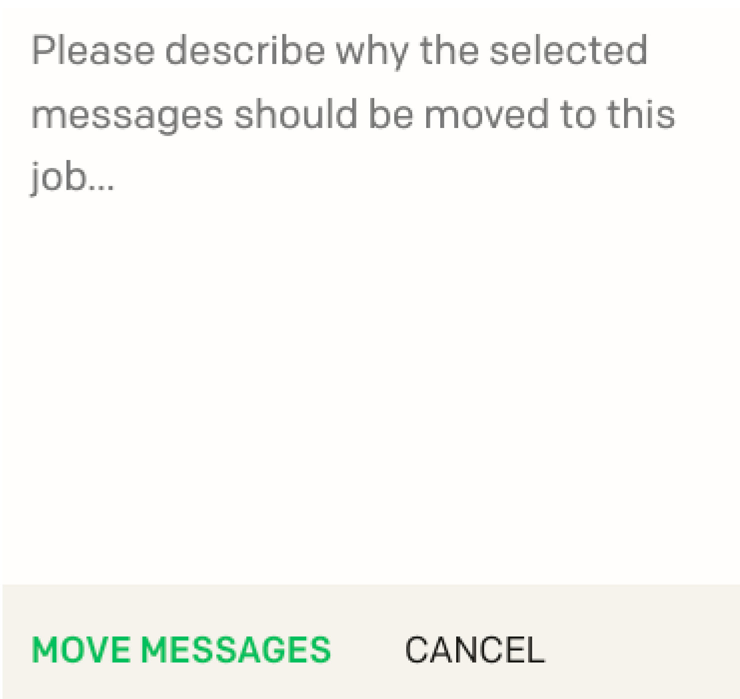
- **Scheduled** - jobs that have a Clara confirmed event (and are currently on the customer's calendar). If there's a date indicated, you can click on "any day" and a calendar will pop up. Then, click on the date indicated to filter for meetings scheduled for that day. You can also search a range of dates if you aren't sure of the exact date.

Note: To view the other categories (below), click on "clear selected days" first. You'll get an error message that says "Failed to execute 'removeChild' on 'Node'". When this happens, you'll need to refresh the page.

- **In Progress** - jobs where we've begun scheduling, but have not sent an invitation; Exo has been set up and annotations have been made.
- **Communication** - jobs that have not been scheduled and/or approved by the customer; The Meeting Creator has not been set up and we've made no annotations.

4. Once you've found the related job, click on the green "+" icon and a text box will pop up.

5. In the text box, add a note describing why the job you're assigned to is being merged in to the job you've selected. Exo will not allow you to merge the job without a note. Click here to see scenarios below for appropriate verbiage.



6. Click on "Move Messages".
7. A pop-up will open: "This request has been moved into another request." The request has been processed and you can navigate back to your dashboard from there.

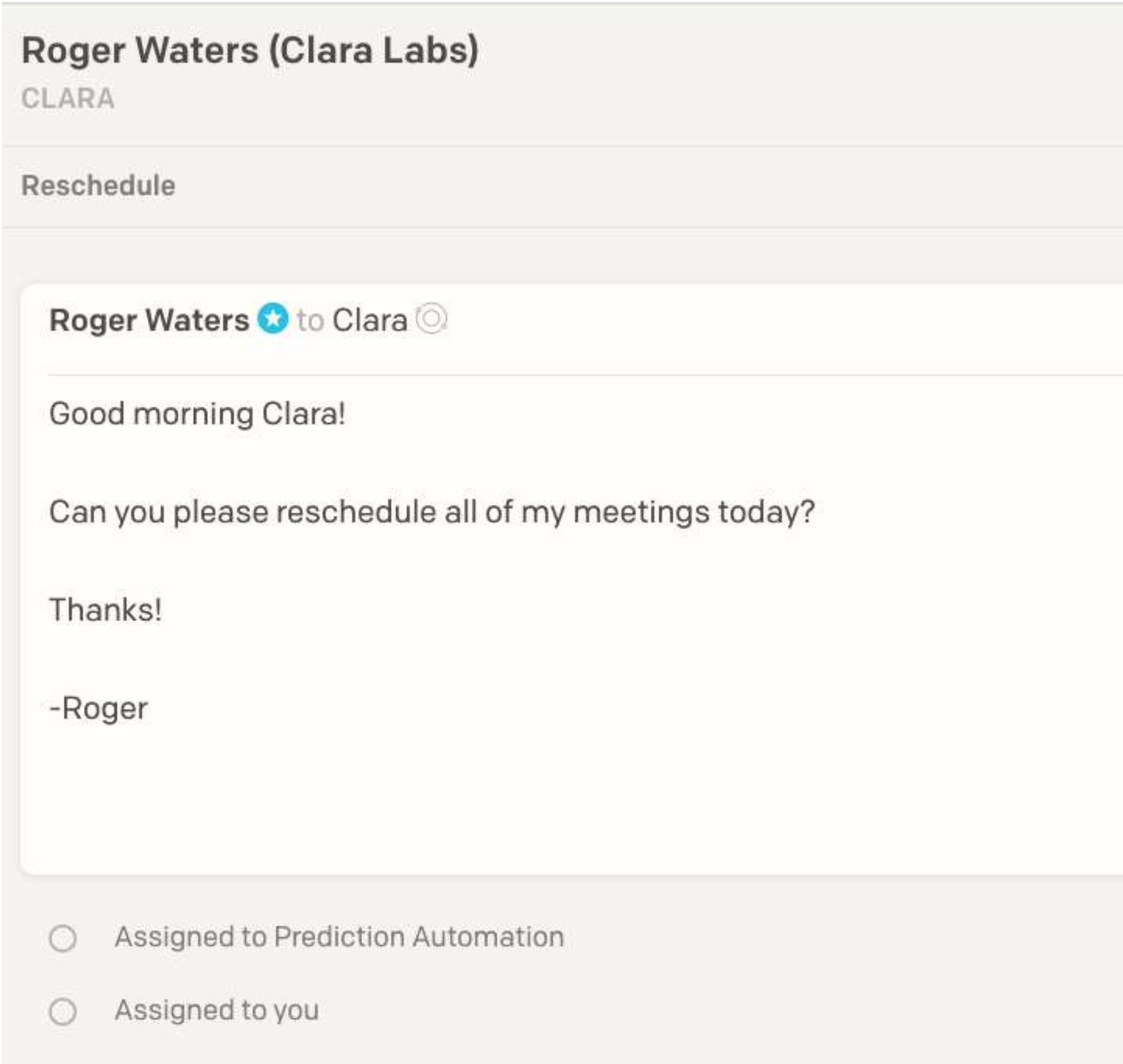
Copy emails to other jobs

Sometimes, you’ll need to copy an email from one job to another, if the jobs are related. Unlike merging a request, the email you’re copying will remain in the original job and also be copied into the related job(s).

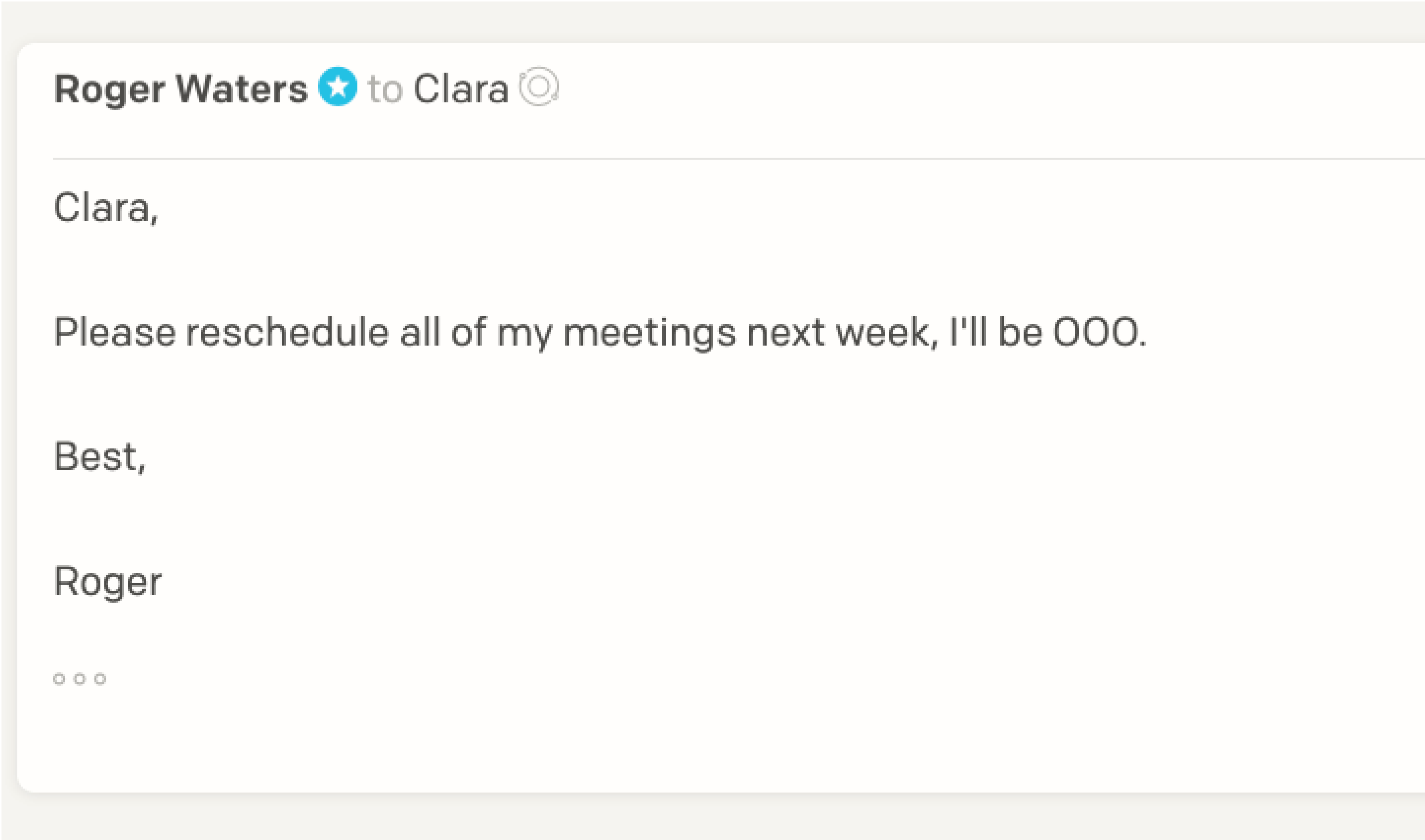
When should I do this?

If you're assigned to a job that appears to be related to other jobs, you'll need to copy the specific email(s) to an existing job. If you don’t have enough time to copy to all of the relevant threads, **please escalate to ‘Other’.**

Example: Customer requests to reschedule all their meetings for today:



Example: Customer requests to reschedule all of their meetings next week:


Roger Waters to Clara

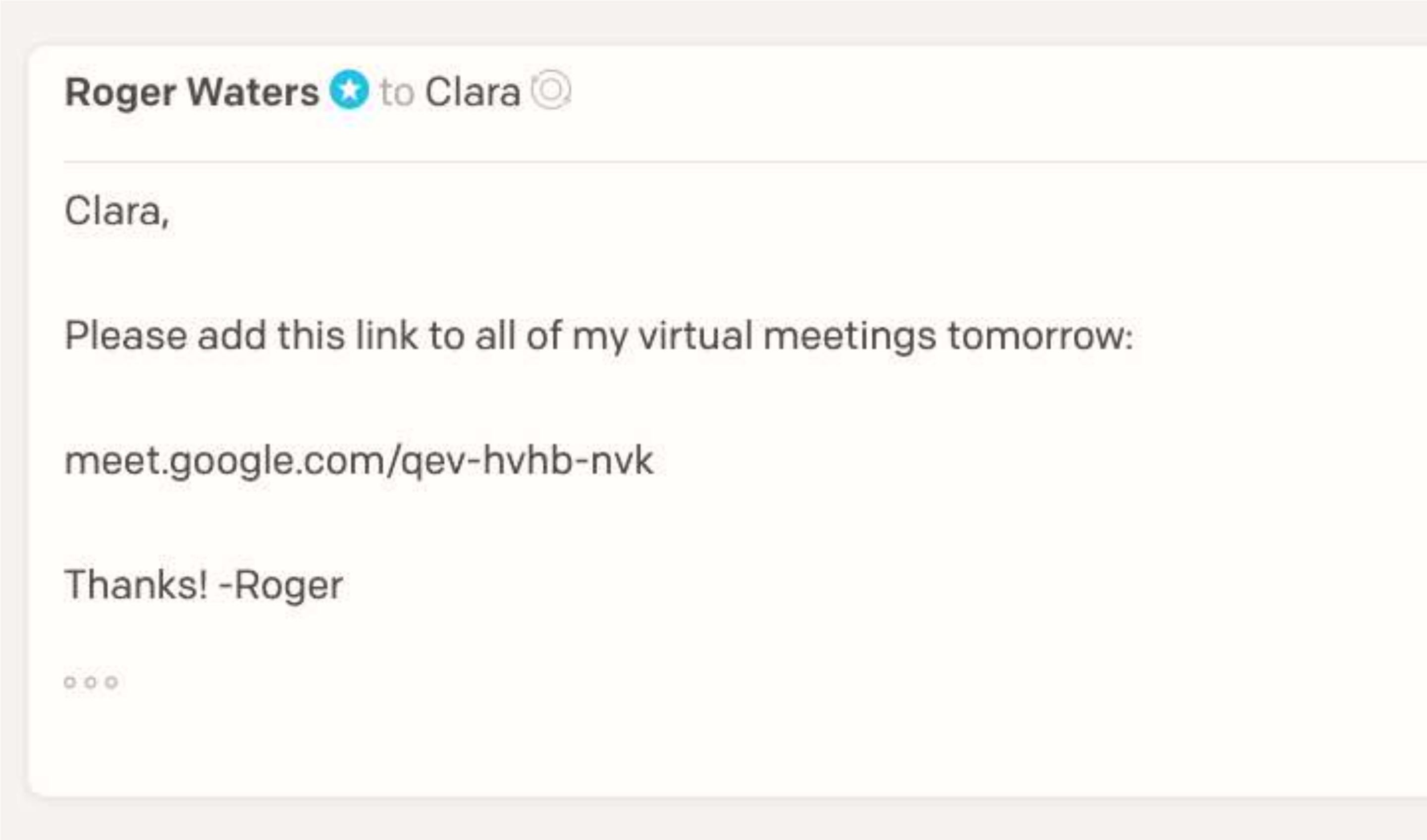
Clara,

Please reschedule all of my meetings next week, I'll be OOO.

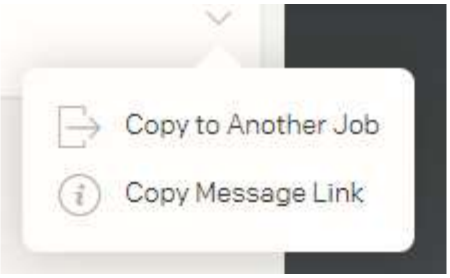
Best,

Roger

Example: The customer requests to use a specific link on certain jobs in a small time frame:



How to copy an email from one job to another job



1. Click on the down arrow on the email you want to copy to an existing job. **(Note: Only one email can be copied at a time.)**
2. Click on "Copy to Another Job".
3. To search for related jobs, you can filter using email addresses. To do this, click on the blue "+" icon and click on the email address of the person you'd like to search for. If the person's email address does not appear (they must be CC'd on the email you've received for it to appear), you can also choose Clara's email address to open up the search to any email that the Clara assistant has sent.

- If you’re still unable to find the related job, you can also search by context using the blank field to the right of the blue "+" icon. For example, if the customer is asking about the status of the meeting with Jane Smith, you can type "Jane Smith" in that field and search from there.

4. The search results are categorized as:

- **Scheduled -** jobs that have a Clara confirmed event and are currently on the customer’s calendar. If there’s a date indicated, you can click on “any day” and a calendar will pop up. Then, click on the date indicated to filter for meetings scheduled for that day. You can also search a range of dates if you aren’t sure of the exact date.

Note: To view the other categories (below), click on "clear selected days" first. You’ll get an error message that says “Failed to execute 'removeChild' on 'Node'”. When this happens, you’ll need to refresh the page.

- **In Progress** - jobs where we've begun scheduling but have not sent an invitation; Exo has been set up and annotations have been made.
- **Communication -** jobs that have not been scheduled and/or approved by the customer; The Meeting Creator has not been set up and we’ve made no annotations.

5. Once you’ve found the related job, click on the green "+" icon and a text box will pop up.
6. In the text box, add a note describing why the job you’re assigned to is being copied to the job you’ve selected. Exo will not allow you to move the job without a note. Click here to see scenarios below for appropriate verbiage.
7. Click on “Copy Message”.
8. If there are multiple emails to be copied, make sure they’re all copied before moving forward. Exo will erase any work you’ve done in the Meeting Creator when you go to the merge screen, so be sure you’ve copied the email to all the necessary requests before you start annotating and processing.

!

Copying emails keeps you assigned to the current job (i.e., Exo doesn’t redirect you to your dashboard). If there is more work to be done, it is your responsibility to complete it. Process the job accordingly.

Copy email to a new job (Creating a Follow-up or Splitting)

Creating a Follow-up or Splitting should only be used in certain scenarios. Otherwise, it can cause confusion in Exo as to where a meeting is being scheduled. This function is used **ONLY** when the event in the existing job ***has already occurred*** and another job needs to be created for the following scenarios:

Customer requests to schedule a follow-up call or meeting with the participant.

You may use the new request function **only** if the customer or participant requests the follow-up call or meeting on a job where a call or meeting has already been scheduled and the event has **occurred**. ***Do not remove the original event from the customer's calendar when scheduling a follow-up call or meeting.***

Robert Plant (Clara Labs)

CLARA

Chat on Sunday

Where: Jane to call Robert at 9881446789

Have a great day!

Best,
Clara

∘∘∘

Call: Jane <> Robert (Clara Labs)
NOV 14
Sunday, 14th November, 2021 (PST)
8:00 — 8:30 AM (30 minutes)

Reference ID: 0f40e1fc (Do not delete)

New messages

FROM **Robert Plant** clarafakecustomer1@gmail.com
TO Jane Smith jane.123claraexample@gmail.com
CC Clara clara@claralabs.com

Hi Jane,

It was great speaking with you. I look forward to our next conversation.

1. Create a new request using the process below. In the text box pop up, add this note: ***Split request to schedule follow-up {call or meeting} here. NFA in {job ID of request you are currently assigned to}.***
2. Copy any other new, relevant emails that should be included in the new thread to the new job.

Chat on Sunday

Great! I just sent you and Robert an invite with the following details.

Call: Jane <> Robert (Clara Labs)
When: Sunday (Nov 14) 8am - 8:30am PST
Where: Jane to call Robert at 9881446789

Have a great day!

Best,
Clara

NOV
14

Call: Jane <> Robert (Clara Labs)
Sunday, 14th November, 2021 (PST)
8:00 — 8:30 AM (30 minutes)

Reference ID: 0f40e1fc (Do not delete)

SELECTED MESSAGE

Robert Plant to Jane Smith & Clara (CC) Nov 14th

Hi Jane,

3. If no other action needs to be taken, archive the original request.

Participant sends Clara an email requesting a follow-up call or meeting with the customer.

You may use the new request function **only** if the participant requests the follow-up call or meeting on a job where a call or meeting has already been scheduled and the event has occurred. ***Do not remove the event on the current job. Only one event should be scheduled per job ID.***

Great! I just sent out the event for you and Robert with the following details.

Call: Dustin <> Robert (Clara Labs)
When: Monday (Aug 29) 4pm - 4:30pm PDT
Where: Robert to call Dustin at 303-555-3458

Have a great day!

Best,
Clara

New messages

Dustin Dobbs to Clara & Robert Plant (CC)

Great chat last night, Robert! Let's set up a follow up call so we can firm up
You pick a time and I'll make myself available. Thanks again and look forwar
with you.

Dusty

1. Create a new request using the process below. In the text box pop up, add this note: ***Split request to schedule follow-up {call or meeting} if customer approves. Respond to participant.***
2. Copy any other new, relevant emails that should be included in the new thread to the new job.

NOTE: If the participant is pre-approved, the CRA assigned to the new job can proceed immediately.

3. If no other action needs to be taken, archive the original request.

Recap: When to Split for a Follow-up

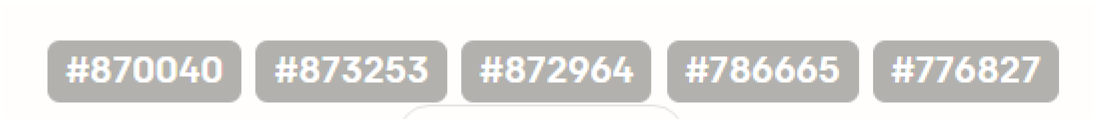
You may split a job in the following scenarios:

- To schedule a follow-up call or meeting after the call or meeting **has already occurred**. Otherwise, loop in Support.
- When there are up to three events with confirmed times. If there are **more than three** confirmed times, loop in Support.
- If we have already scheduled three calls from one original request (and each has occurred before scheduling the next). If another call is requested, loop in Support.

How to create a new request

1. Determine that the New Request button needs to be used based on the scenarios above.
2. At the bottom of the email that you need to copy, click on the down arrow, and click on “Copy to Another Request.”
3. Click on the “New Request” button. Add a note as per the instructions above.

4. After submitting it, you will receive a pop-up letting you know you have successfully created a new request. On the job you are assigned to, you should see the new job IDs listed below on the emails you copied.



Copy + Merge preferred formats

A general rule is to keep notes clear and concise. Make sure to provide complete information and avoid any ambiguity so that any CRA who gets assigned to the associated job knows how to process the newly assigned job.

Here are some examples. Please edit as contextually necessary:

Scheduling a follow-up virtual or in-person meeting

Description note: Split request to schedule follow-up {call or meeting} with {participant} here. NFA in {Job ID of request you are currently assigned to}

Example: Split request to schedule follow-up call with Jane here. NFA in #11472634.

Copying bulk cancellation requests (e.g., "Please cancel all meetings today")

Description note: Please {reschedule}{cancel} {call or meeting} with {participant} here.

Example: Please cancel meeting with Jane here.

Customer or participant requests to schedule multiple events with no known dates and times (i.e., requires suggesting and confirming multiple times with participants) in one email.

Roger Waters (Clara Labs)

CLARA

Meetings in September

Roger Waters to Candace Bright & Clara (CC)

Candace,

Let's get those meetings set up that we've been talking about.

Clara, please set up a 1 hour meeting the first week of September with Can

Please also schedule a 45 minute meeting on both the second and third we

Mondays are usually easier for me, but I can move things around if you war

-Roger

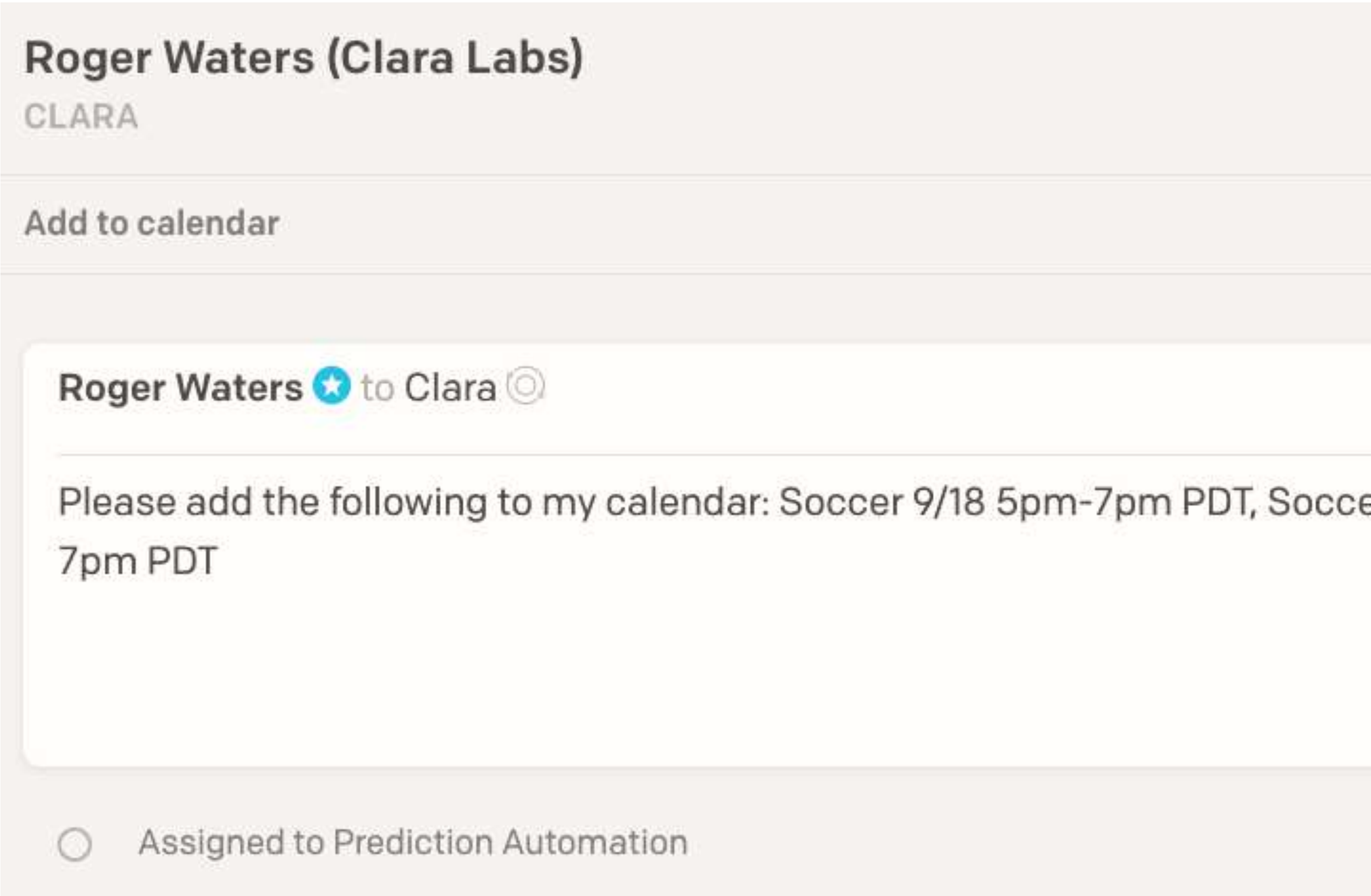
1. Loop in Support.
    i. If the participant asks to schedule multiple events, do not confirm with the customer first. Directly loop the customer in to Support.

Customer requests to add multiple events (up to 3 events) with known dates and times to their calendar (e.g., flights, already-scheduled events, etc.) with or without participants

If there are more than three events, immediately loop in Support. Otherwise, proceed as follows:

1. Split each event from the original job and provide instructions for which event to schedule. In the notes, please say: ***"Please schedule (copy and paste date/time/information) here"***.

For example: "Please schedule Soccer 2/20 5pm-7pm here."



2. Schedule the first instance in the job you're currently in.

Stacked requests (Requests that have multiple emails, all with different instructions, different participants, etc)

Example: Multiple requests with different participants, that require suggesting times, are all in one email.

Frank Ocean, Roger Waters (Clara Labs)

CLARA

Interview with Roger Waters

Roger Waters to Dustin Dobbs & Clara (CC)

Hey Clara, can you please schedule a 30 minute call with Dustin?

Thanks,
Roger

Assigned to Prediction Automation

Assigned to you

Roger Waters to Frank Ocean & Clara (CC)

Hey Clara, can you please schedule a 30 minute call with Frank?

Thanks,
Roger

Roger Waters to Candace Bright & Clara (CC)

Hey Clara, can you please schedule a 30 minute call with Candace?

1. Loop in Support.

Codewords

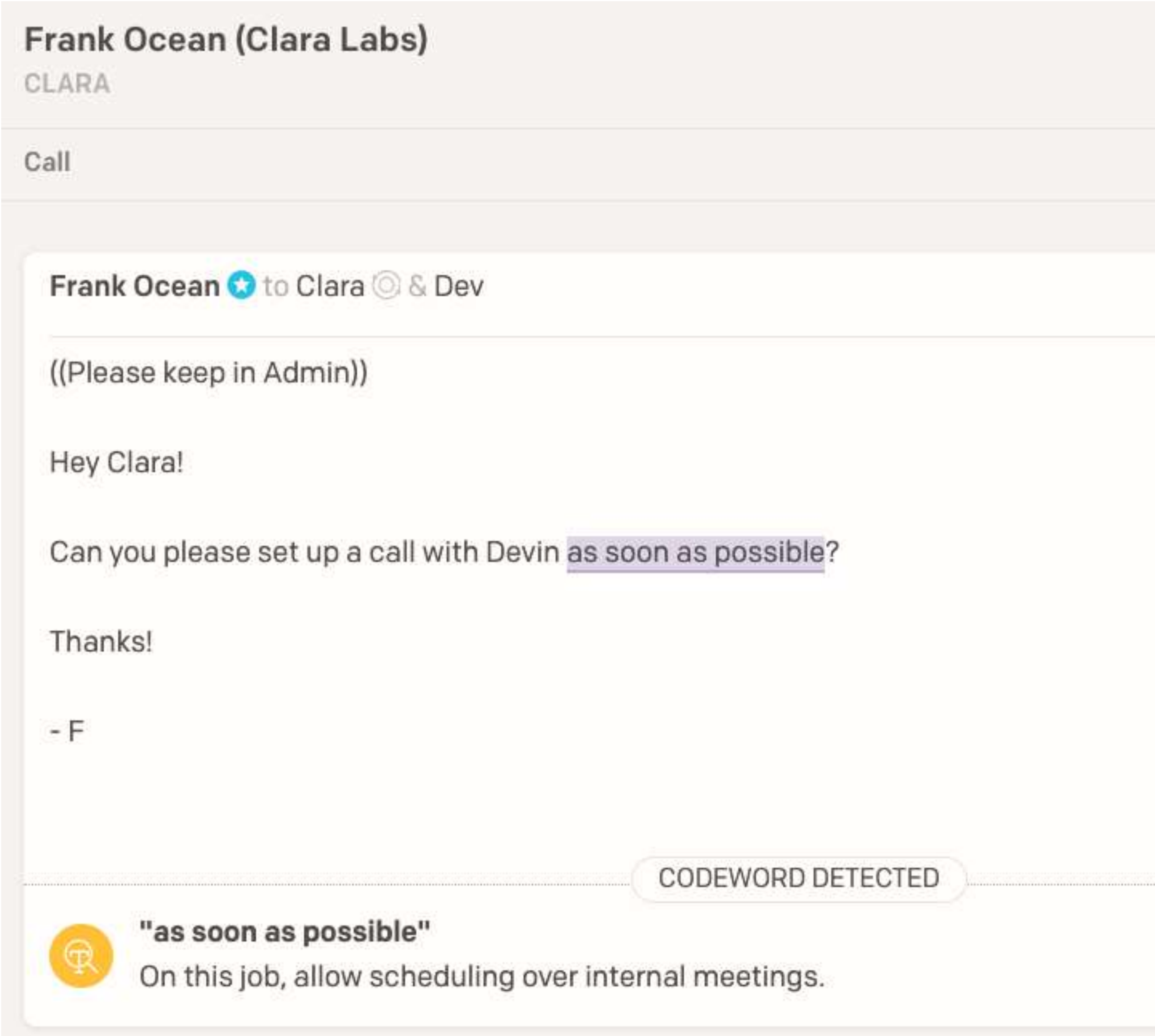
Suggest Edits

Codewords allow a customer to give CRAs specific instructions without mentioning it explicitly in the email. The customer can choose a unique word or phrase that will trigger specific instructions (codeword intent) for you to follow.

If the customer provides instructions in the email that conflict with a codeword intent, follow the instructions in the email over the codeword intent.

Codeword Intent

The codeword intent refers to the instructions triggered by a codeword. You'll see this when the codeword is triggered at the bottom of the initial email, as pictured below.



The following are the most common codewords and their corresponding instructions.

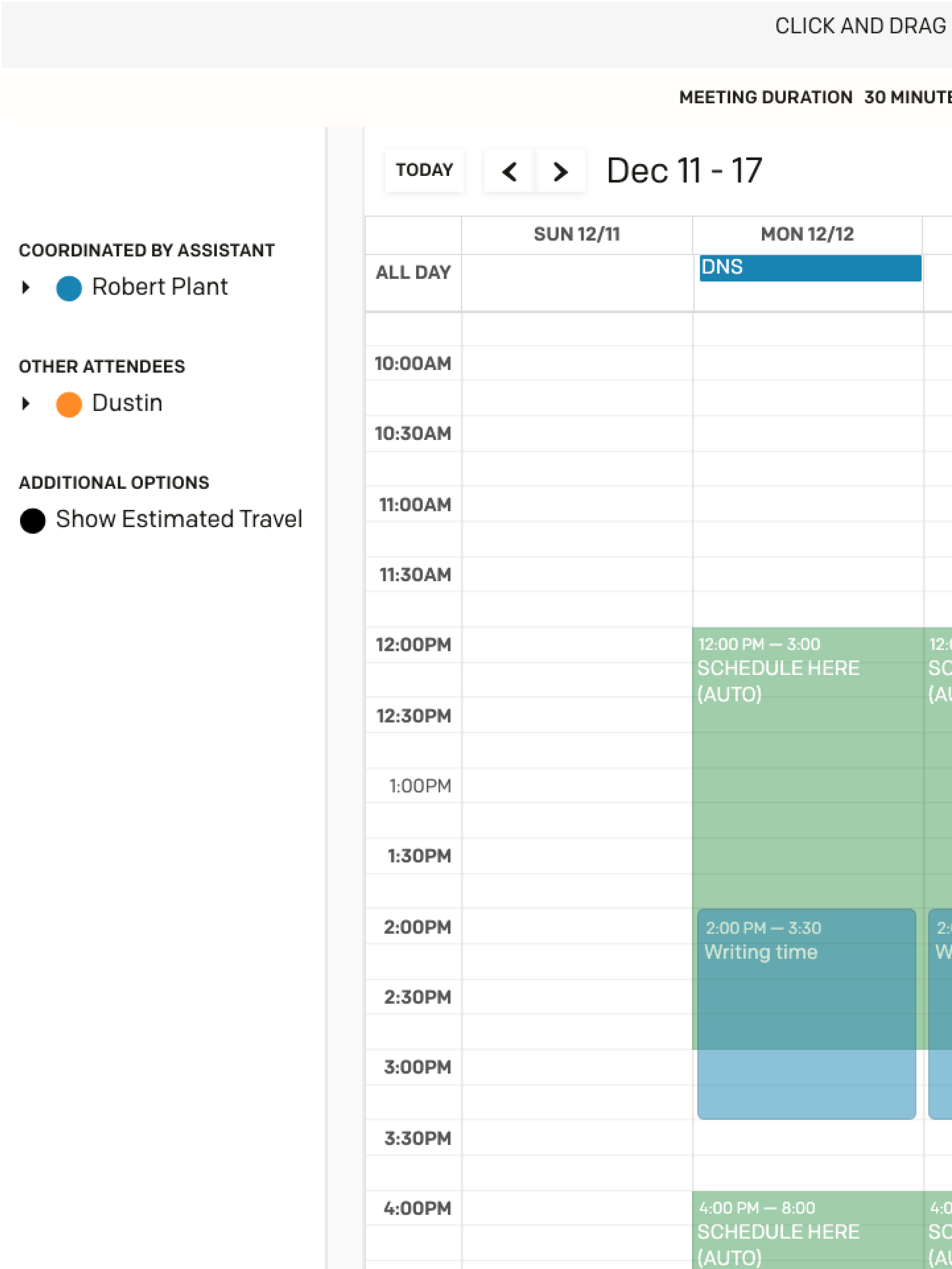
Accommodate the participant

When this codeword is used, you can change the customer's default preferences if the participant requests something different. The customer's preferred meeting times will expand to 8am-7pm in their time zone, and you may ignore their buffer preference when this codeword is used. You also do not need to notify the customer if any changes from their defaults are made. This can include any of the following:

- Changes in virtual channels or in-person locations
- Updating the meeting from in-person to virtual (or vice versa)
- Duration

Allow scheduling over internal meetings

When this codeword is used, you can schedule over any meetings that either have participants on the customer's list of approved contacts or any internal meetings with teammates that share the customer's domain. These meetings will show as transparent blocks on the customer's calendar.



CLICK AND DRAG
MEETING DURATION 30 MINUTE
COORDINATED BY ASSISTANT
Robert Plant
OTHER ATTENDEES
Dustin
ADDITIONAL OPTIONS
Show Estimated Travel
TODAY
Dec 11 - 17
SUN 12/11
MON 12/12
ALL DAY
DNS
10:00AM
10:30AM
11:00AM
11:30AM
12:00PM
12:30PM
1:00PM
1:30PM
2:00PM
2:30PM
3:00PM
3:30PM
4:00PM
12:00 PM — 3:00
SCHEDULE HERE
(AUTO)
2:00 PM — 3:30
Writing time
4:00 PM — 8:00
SCHEDULE HERE
(AUTO)

In the picture above, the codeword would allow you to schedule over "Hold", as well as "Writing time".

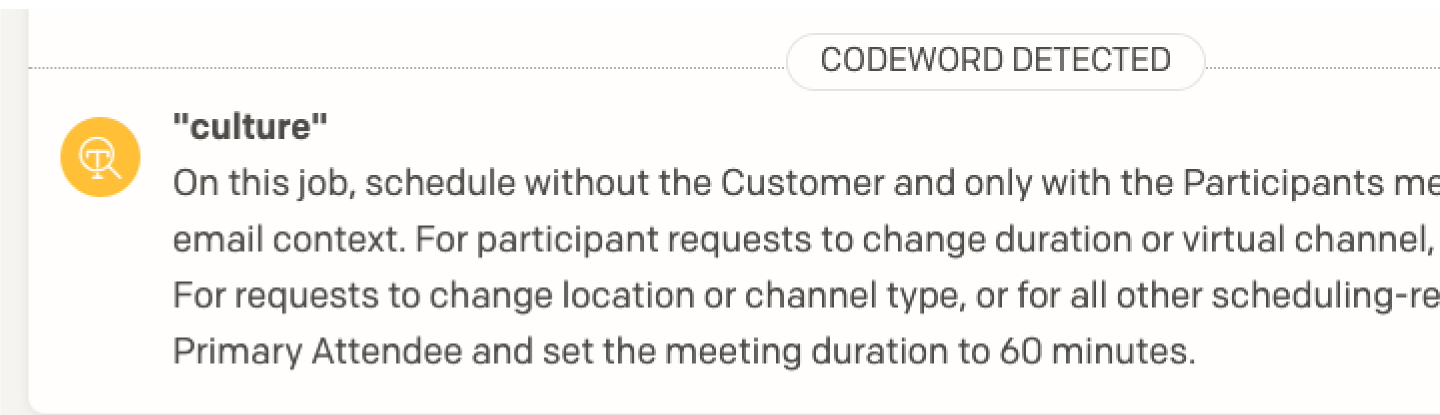
However, this does **NOT** allow you to schedule over any "DNS" all day events, solid-colored meeting blocks, or outside the customer's PMTs. To accommodate those, please check with the customer before confirming the time.

Prefer Participant Times

When this codeword is used, the customer wants you to hold off on suggesting times on the initial email. Instead, you should send the "Ask participant for meeting times" template.

If the participant has not responded with times when the snooze reopens the job, you should suggest times and send the "Follow up One" template.

Coordinating for Others



This codeword will prompt you to schedule **without** the customer, also know as [Coordinating for others](). Often, as shown above, it also includes other information, such as duration or channel, since the customer's defaults will not populate in Exo.

Modifers for Codewords

Each customer has the option to include extra instructions on to their codeword, or they can create a new codeword that will request you to use preferences that may not be the default. Below is a list of the most common changes:

- Duration
- Buffer
- Virtual details
- In-person details
- Follow up Frequency
- Follow up Max
- PMTs

These should all be followed throughout the scheduling process and not just on the initial email. This is why it is extremely important to read the whole thread before continuing to process.

Participants

Suggest Edits

The **Participants Step** is where names, contact info, time zones and coordinators are annotated. It includes the following actions:

* Add / Remove Participants	* Modify Participant Name	* Add / Change Tim
* Add Participant Company Name	* Add Participant Phone Number / Skype ID	* Assign Coordinato

Defaults

Before moving through the Participants Step, determine whether Clara should schedule in the first place.

- The vast majority of the time, the answer is **YES**! If email context indicates that something is to be scheduled, move forward and process, even if the customer doesn't explicitly ask Clara to schedule. **Do not send a separate email directly to the customer just to acknowledge the request.**

- However, if the email is spam, or if Clara's actual email address has not been cc'd and Clara is only part of a distribution email address (e.g., team@company.com, or all@company.com), immediately archive (process with no snooze) the job by processing with no snooze. Examples of spam include Google notifications for new people added to Clara customer accounts and mass emails for group events.

The Participants Step is where you indicate who will receive a calendar invite, regardless of whether or not they will attend the meeting.

Adding Participants

By default, we include everyone on the Participant Step (customer or participant) unless context states that only specific people should be included.

Examples of when to schedule for everyone:

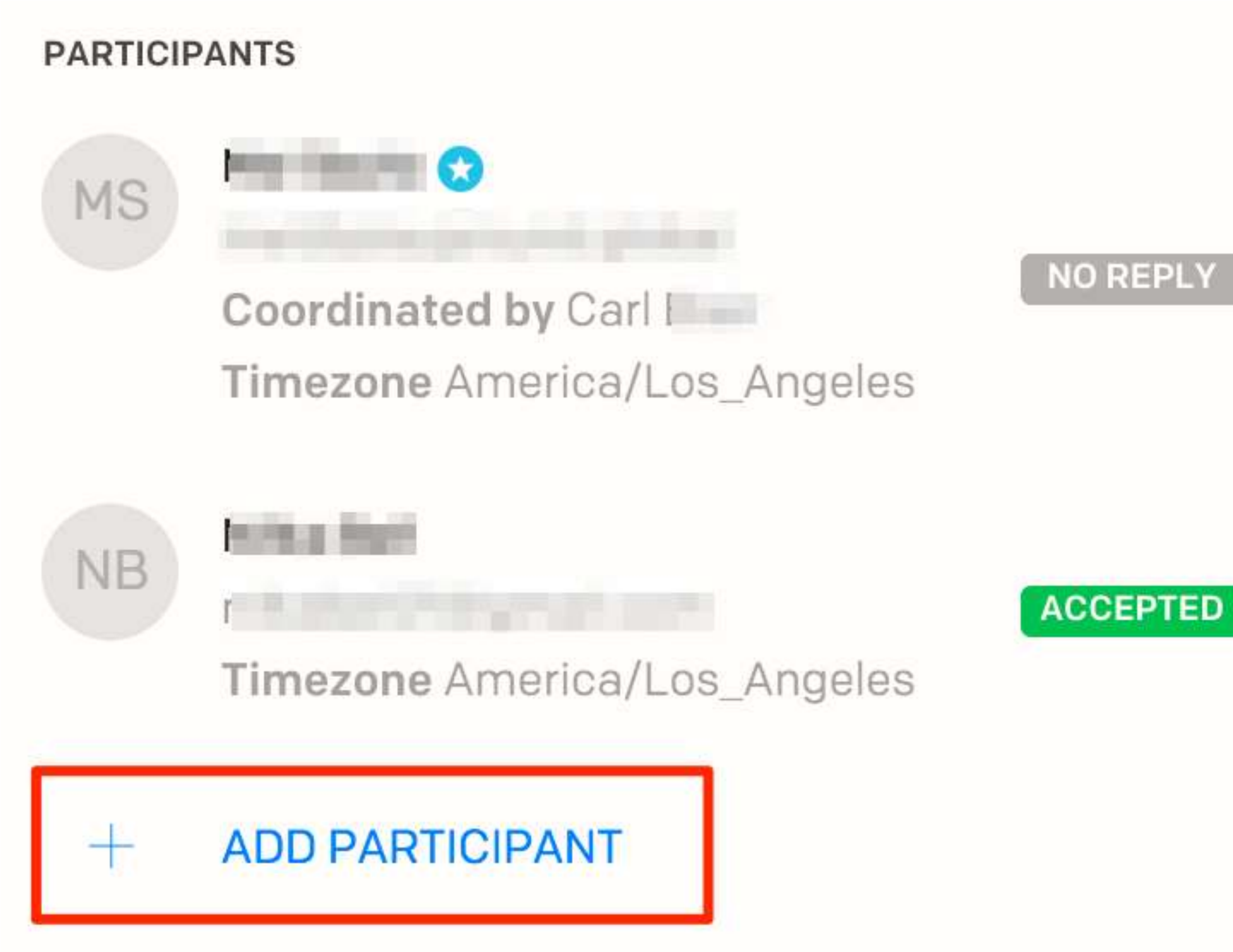
- Clara, let's set up a call this week.
- Looping in Clara to help with my calendar.

Examples of when to schedule for specific people:

- Clara, please schedule this call for me and participant Y next week.
- Clara, please suggest times for a call for me, participants Y and Z.
- Clara, please schedule for participant X and Y this week.

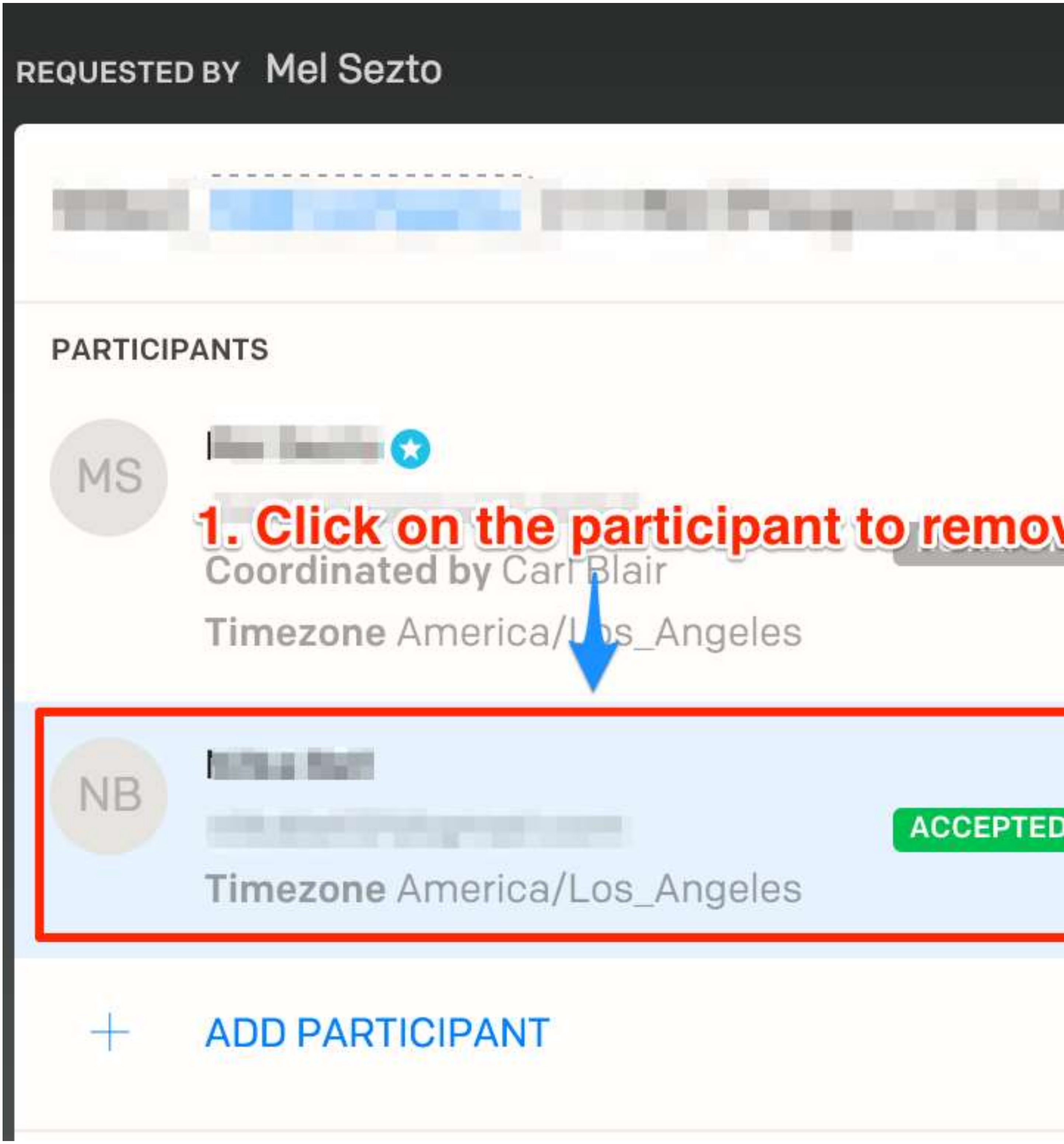
Click on "Add Participant" in the Meeting Creator and select from the dropdown of potential meeting attendees, or input the person's name and email address manually. **Note that anyone added will receive a calendar invite when Clara has confirmed a time.**

We support scheduling for a maximum of 8 people. If requested to schedule for 9 or more people (customers or participants), please loop in Support.



Removing Participants

Click on their name tile and then on "Remove from meeting."



Primary Attendees: Taking Over for Customers

Sometimes, customers ask Clara to schedule a meeting that they themselves won't attend. The meeting attendees might include one or more different customers, colleagues, and/or participants whose calendar Clara may or may not have access to.

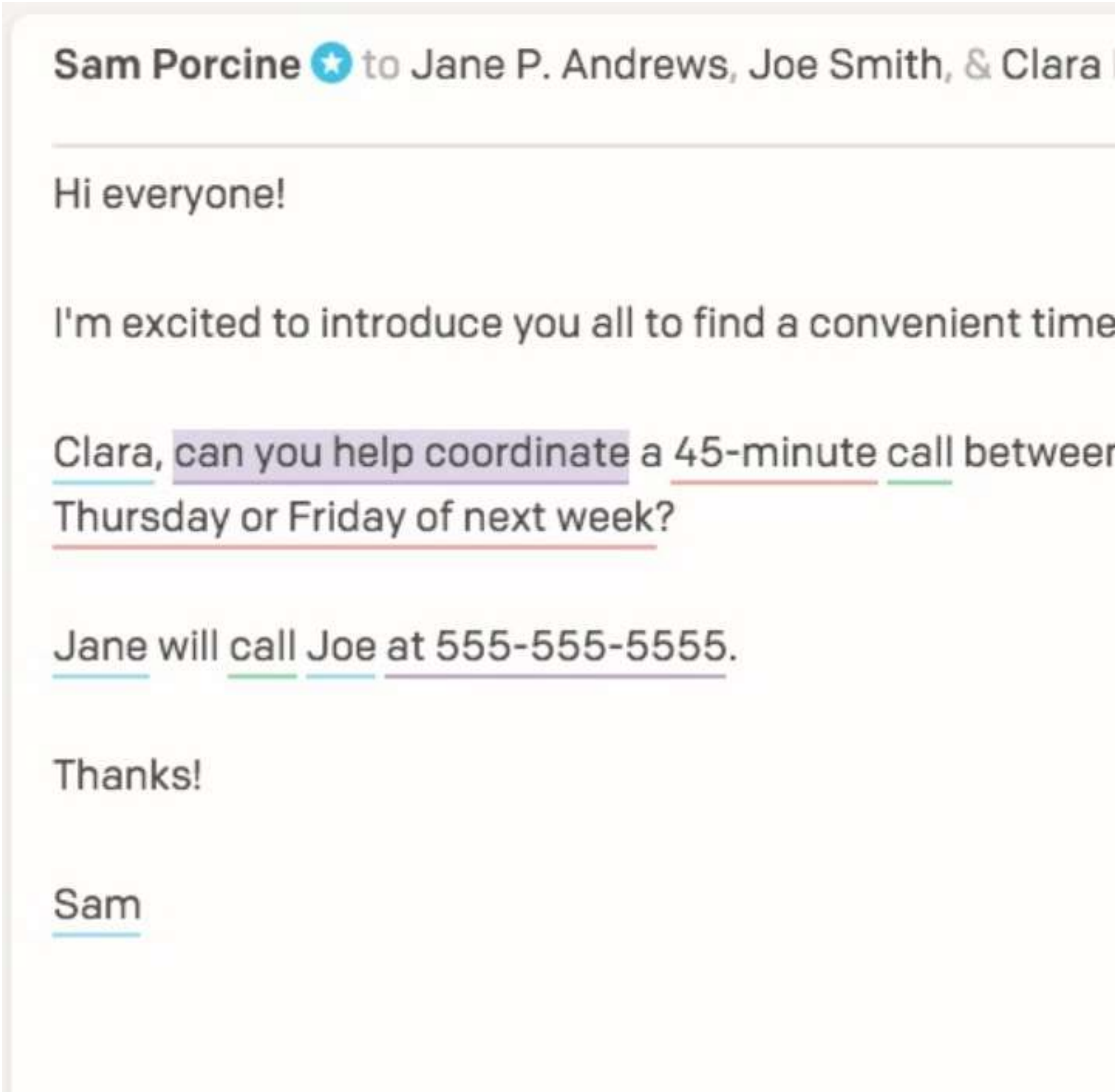
In these jobs, **do not** add the customer to the Participants Step. Instead, you must set an attendee to fill the role of the customer. That attendee is called the "Primary Attendee," whom Clara schedules on behalf of.

Sometimes a customer might request to be added to the invite only, as optional or to use their Microsoft Teams link. In these cases, please still add the customer to the list of attendees, but designate a different Primary Attendee.
Primary Attendees may or may not have their own set of preferences (depending on whether they themselves are Clara customers).

Recognizing the Primary Attendee is straightforward. Often, they're any of the following:

- The interviewer
- The hiring manager or HR lead
- The person who the requesting customer said would conduct the meeting
- The one with the same email domain as the requesting customer's

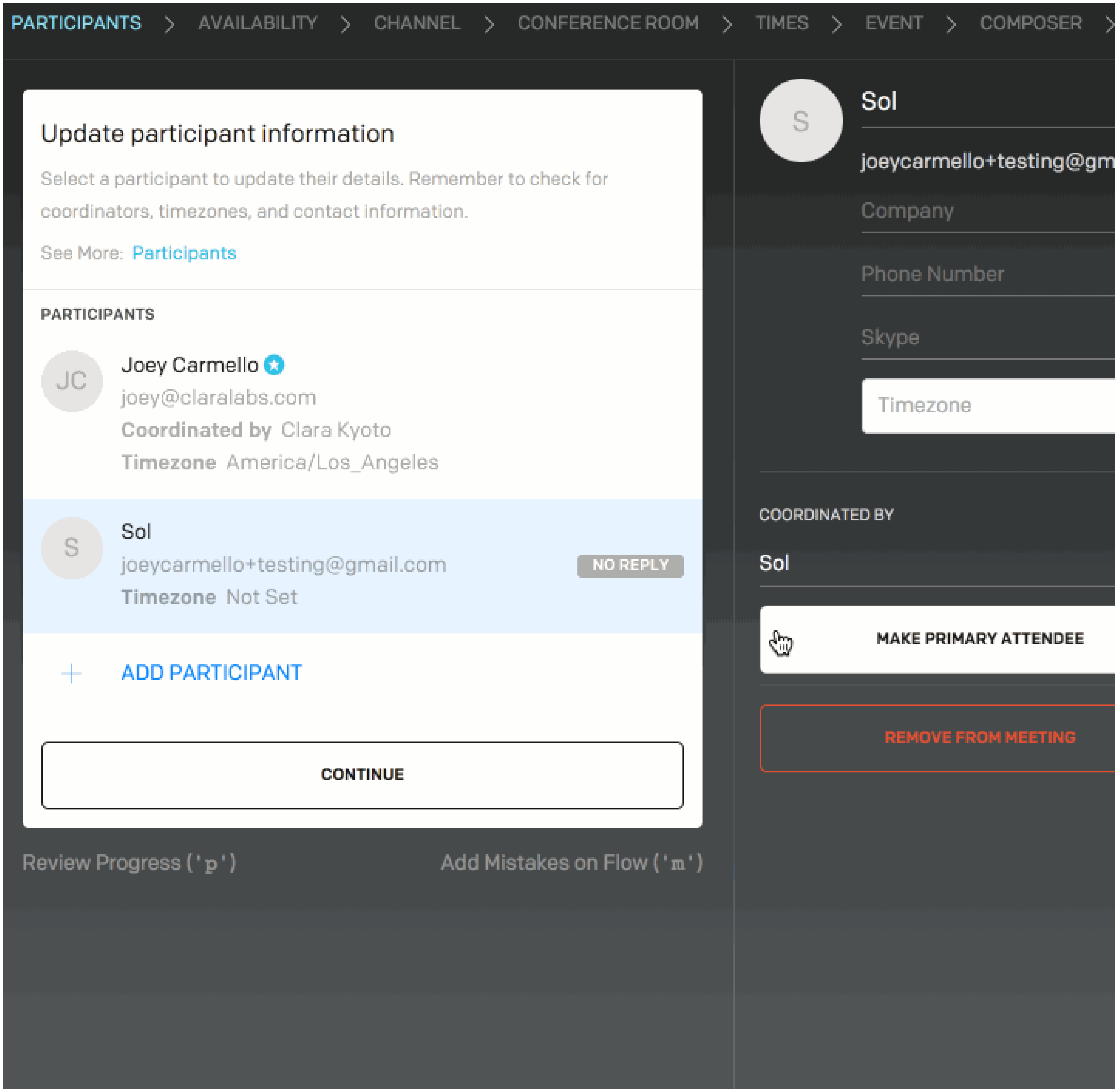
For example, in the job below, Customer Sam asked Clara to schedule a meeting for Jane and Joe. Sam won't attend the meeting, and Jane, being the interviewer, is the Primary Attendee.



How to Make Someone a Primary Attendee

The Primary Attendee is designated with a gold “Primary” tag next to their name.

To set an attendee as a Primary Attendee, click on their name in Participants Step and then on the “Make Primary Attendee” button. If you need to change the Primary Attendee, use the same button:



Other Primary Attendee Considerations, Step by Step

Participant Step

If present in email context, annotate the Primary Attendee’s name, company name, phone number, Skype ID, and time zone. If a time zone isn’t present in email context, don’t annotate anything. Sometimes, the Primary Attendee’s email domain is the same as the customer’s, which means that they belong to the same company. Annotate accordingly.

If Clara has access to the Primary Attendee's calendar, Clara will automatically be set as the Primary Attendee's coordinator. If Clara has no access to their calendar, the Primary Attendee coordinates on their own behalf, and we’ll need to suggest times to them in the same way we suggest times to participants.

Channel Step

If the Primary Attendee is not another Clara customer, they won’t have their own virtual meeting or in-person meeting preferences. However, sometimes the requesting customer’s Zoom will appear. If Zoom is requested, annotate that option.

Otherwise, annotate a “Custom” channel based on email context. By default, for virtual meetings, the Primary Attendee initiates the call if no other channel is requested. For example, if Bob is the Primary Attendee and Jane is the participant, and if we don’t yet know Jane’s phone number, you would manually write a custom channel: “Bob to call Jane at TBD.”

If no details are present in the Channel step, annotate “TBD” and request the details in the Composer Step. For example, if Zoom is requested but not available in the Channel step, add verbiage to your email to ask for the Primary Attendee’s Zoom details.The same is true for a phone call; ask the other participant for their phone number.

Times Step

If Clara has access to the Primary Attendee’s calendar, consider it when scheduling. Exo will automatically set 9am to 6pm as the preferred meeting times (PMTs) for Primary Attendees without calendar access. If either the participant(s) or the Primary Attendee want to schedule outside, accommodate accordingly.

Composer Step

If there’s no access to the Primary Attendee’s calendar and Clara needs to suggest times to both attendees, use the regular template to suggest times, not the strikeout template. Remember, an invite cannot be sent without both participants confirming their availability.

Annotations

Participant Name

- Annotate in **FirstName LastName** format. Edit if it appears differently on the Meeting Creator. Always double check to be sure names have appropriate capitalization. Names can be found in the subject line, title, previous message context, or signature of an email. If you can reasonably figure out the name from the email address (ex. cat@claralabs.com = Cat), you can annotate based on that too.
- If email context shows a last name, it must be annotated; otherwise, the Meeting Creator should reflect only the first name. Middle initials or names are optional and can be annotated, if available.
- Address participants and customers by their first name. **Avoid using gendered pronouns (she, he, her, him) unless email context already indicates gender. Otherwise, just repeat the participant's name or use "they."**
- When email context or a signature shows any title (e.g. Dr., Engr., Atty., Mr., Ms., Mrs., MD, etc.) attributed to a participant, use that title when addressing them. **(Note: MD should not be changed to Dr.)**
    - For example:
        - "Sincerely, Dr. Smith" --> Annotate as "Dr. Smith" and call them "Dr. Smith"
        - "Best, Mrs. Doe" --> Annotate as "Mrs. Doe" and call them "Mrs. Doe"
        - "Many thanks, Joe. --- Joe Brown, MD" --> Annotate as "Joe Brown, MD", but okay to call them "Joe", if that's how everyone else addresses them

Addressing Participants with Titles

If a participant's signature is "Dr. Mary Smith" and everyone calls them "Mary" and that version of their name is also present in their signature, annotate as "Dr. Mary Smith, MD" and call them "Mary". For example:

"Best, Mary

Dr. Mary Smith"

It's not incorrect to err on the side of caution and use their more formal title, however, we should follow the contextual clues in the emails closely.

It **IS** incorrect to not annotate their title or not use it when that is how they are addressed or request to be called in the thread.

- If no name is provided and cannot be easily inferred from the email address, copy and paste the email address into the “Name” section and proceed with the following.
- If there are multiple participants with the same name (example: Chris Martin and Chris Hemsworth), please acknowledge them by their first name and last initial (Chris M. and Chris H.). This should be carried out through the Event Step (when applicable) and Composer Step (Hi Chris M., Chris H.,). If they have the same first name and last initial (Chris Martin and Chris Matthews), you would use both their first and last name when addressing them.

Customer names

Customer Names cannot be edited in Exo. If adding a customer manually, please ensure the name is spelled correctly. It cannot be edited once added. Customer names should be spelled, capitalized, and formatted exactly as they appear in Exo.

Coordinator

Coordinators schedule on other people’s behalf. So, by definition, Clara is a customer’s coordinator.

If a participant has their own coordinator, you need to annotate that coordinator in the “Coordinated By” field; otherwise, Exo defaults to designating these participants as their own coordinator — that is, they schedule on their own behalf. Coordinators should not be added as participants unless context states they will be joining the meeting or they request a copy of the calendar invite.

When Clara has access to someone’s calendar, theoretically Clara knows enough to schedule for them. So, Exo automatically designates Clara as that person’s coordinator. **Do not change this unless email context shows that that person has their own coordinator — whether another Clara assistant, or an executive assistant (EA), or a personal assistant (PA), etc.**

- Clara always coordinates for the customer Clara is assigned to. Customers have a star badge next to their name.
- Clara might also coordinate for their colleagues. If these colleagues aren’t themselves Clara customers, their names will appear with a hollow blue circle icon. If someone has this icon next to their name and Clara hasn’t already been designated as their coordinator, annotate Clara as their coordinator.
- Less commonly, Clara might also coordinate for people who look like ordinary participants, but who are actually Clara customers themselves. ***It’s important to note that if these customers have a different Clara assistant, Exo currently shows no special icon to indicate that Clara has access to their calendar.***

!□

So, it's critical that you pay careful attention to the list of attendees in the Participants Step. If Clara is coordinating for ***two or more attendees***, you must open the full calendar view to make sure you account for multiple sets of calendars and PMTs in case there's more than one customer. And if Clara is coordinating for ***all attendees***, confirm a time right away. There's no need to suggest times.
If Clara is scheduling with a coordinator but doesn’t have the participant's email address, you must add the coordinator to Exo as a participant.

- Customize the invite title so it shows the participant's name, not the coordinator's (Event Step).
- If the coordinator will not attend the meeting, tweak verbiage so it indicates that the customer's meeting will be with the participant instead (Channel Step AND Composer Step).
- If the coordinator provides the participant's email address, add it to the Meeting Creator and set the participant's coordinator appropriately. Remove the coordinator as a participant unless they will attend the meeting and/or want a copy of the calendar invite. You’ll also need to ask the coordinator for the participant’s email address.

All emails are sent to coordinators; don’t email the participant separately unless they respond to Clara.

If a Participant loops in their Coordinator

Sometimes, a participant will hand off the scheduling to their coordinator and ask us to schedule with them. It's important that we acknowledge the participant and begin scheduling with the coordinator.

1. In the Participants Step, add the coordinator to the correct participant.

2. **If times have not yet been suggested:**
    i. In the Composer Step, suggest times using the appropriate "Suggest times" template.
    ii. Add the participant to the BCC field and add the following verbiage to the top of the email: "Thanks, {{participant}}! (Moving to BCC)"
3. **If times have already been suggested:**
    i. In the Composer Step, select the appropriate "Suggest New Times" template and adjust the verbiage as if we are reaching out to the coordinator for the first time ("Happy to get this call scheduled for {{customer}} and {{participant}}.", "Happy to help find a time for everyone.")
    ii. Add the participant to the BCC field and add the following verbiage to the top of the email: "Thanks, {{participant}}! (Moving to BCC)"

Time zone

In Exo, by default, the customer's time zone field shows their default time zone (set by the customer), and the participant's time zone field is blank. Customers choose their default time zone, however, this is not an option they can update from their Dashboard.

Customer Travel

If the customer states they are traveling, we should always ask their travel location, dates of travel and preferred meeting times. Any changes should be escalated so that their calendar is correctly annotated. If the customer notes they're traveling for an extended period of time and would like us to change their default time zone, please loop in Support
For Primary Attendee jobs, annotate a time zone only if there is one present in email context. Otherwise, no annotation is necessary.

When to annotate the participant's time zone

- When a participant’s email or signature references a time zone
- When a customer requests that Clara suggest times in a specific time zone

When not to annotate

- If the participant references the time zone suggested by Clara (an obvious copy and paste of our suggested time)

- If we are scheduling an in-person meeting. Time zones should never be annotated for participants for in-person meetings.

Do not research the internet or use phone numbers or email addresses to determine time zone; rely exclusively on explicit email context.

How do time zones affect Exo?

- The customer's time zone affects the customer's PMTs in the Times Step. All events will be shown with respect to that time zone.
- The participant's time zone affects verbiage in the Composer Step. All times stated by Clara will show that time zone. If no time zone is indicated for the participant in the Participants Step, times stated will reflect the customer's time zone.

Arizona

If you need to annotate Mountain Time, please use "America/Phoenix" only when the participant states they are in Arizona. Otherwise, annotate "America/Denver."
If a participant mentions a time zone but no location, here is a list of example cities you can annotate for that time zone.

Time zone	City
PDT/PST	Los Angeles
MDT/MST	Denver
CDT/CST	Chicago
EDT/EST	New York
GMT/BST	London
CET/CEST	Paris
EEDT/EEST	Bucharest
BRT (Brazil)	Sao Paulo

Time zone	City
GMT +6	Bishkek
Note: Australia has many time zones. Most common:	
AEDT/AEST (GMT +11)	Sydney
AEST (GMT +10)	Brisbane

Phone number / Skype ID

- You cannot annotate these for customers, as this info is already built into Exo.
- If present in the email context or a signature, annotate the participant’s phone number and/or Skype ID regardless of whether we’re scheduling a virtual or in-person meeting. Annotate exactly as they appear, including the country code if indicated (by a plus sign) - e.g., +61 555-5555. If the participant has multiple numbers, annotate only the **mobile** or **cell** number.

Company name

- You cannot annotate this for customers, as this info is already built into Exo.
- Annotate for customers' colleagues. You can tell they're colleagues if they have the same email domain or have the Colleague emoji next to their name in the Participants Step.
  - If the customer's company is displayed as "Customer's Organization", then it does not need to be annotated for colleagues. ((This means they did not add a company name on their Dashboard.))
  - Some customers have multiple email addresses for their different companies. Depending on the email address the customer's sends the request from, a CC'd colleague might not share the same company as noted at the top of the page.
- Annotate for participants based on explicit information in their **email signature** or in **email context** only, not their email domain (name@xyz.com does not mean their company is XYZ). You should not be searching outside of Exo to find company information.
  - If it’s clear for one participant and that participant has a colleague with the same email domain, annotate the same company name for the colleague.

    - If it's explicit for the participant's coordinator, annotate the same company name for the participant.
- Often, the name of a school does not represent a company name. Annotate the school name only if it is explicit that the participant works there *(e.g., Vice President of Admissions, Cleveland State University)* and is not just a student *(e.g., Graduate Program 2027)*
- A participant's company may not always match their email domain. If you are unsure, you can escalate for assistance.

Situational Protocols

If a job has no customer

There are two types of jobs that may have no customer: The Clara assistant is on our domain (@claralabs.com) or the Clara is on the customer's domain (@anothercompany.com).

For either scenario, use Exo's *Move* tool to see whether you can identify the customer in order to be able to process the request before escalating. If you're able to identify the customer and find their email address, proceed based on the following:

- The job may be exclusively related to another one, such as a request to reschedule a meeting we've already created. Move it accordingly.
- A participant may be asking for a new meeting. If the participant has not been pre-approved to schedule (Escalate to Admin if you cannot see the customer's Domain or Contact Permissions), ask the customer for approval, as per protocol below.
- The customer may have looped in the wrong Clara assistant. If that's the case, the Composer Step will show the "**A customer looped in the wrong Clara**" template, which will populate the correct assistant's information.
- The customer may have emailed the correct Clara assistant, but from an unregistered email address. If that's the case, send the "**Customer is not recognized**" template. **Note: If they also CC their Clara recognized email address, you can proceed with scheduling. Do not include their unrecognized email address as a participant.**
- If none of the situations above apply, escalate the request so that the customer can be found. Only send the "**Request not including customer**" template if an Admin note has been left to do so.

If Clara receives an invalid email notification

- If you get an invalid email notification (sometimes indicated as a "permanent failure"), and the customer is the one who provided the invalid email address, forward the notification to the customer using the "**Invalid email provided**" template in the **Composer Step**. Remove the email address that the bounceback came from (usually Mail Delivery Subsystem) from the "TO" field and add the customer's email address there instead. Continue scheduling with other participants, if any. If we can continue scheduling with other participants, remove the invalid participant from the Participant step.
- If a participant provided the invalid email address in a group of participants:
    - Remove the invalid participant from the Participant step.
    - Let the participant who looped them in or someone looped in on their domain know using the "**Invalid email provided**" template in the **Composer Step**. Adjust the template to ask the other participant for the correct address:
      "{{Participant}}'s email address is invalid. If you could pass along another email address for them, I would be happy to include them in scheduling."
    - Continue scheduling with other participants, if any.
- If the messages indicate the system will continue to attempt to deliver the email, process with no action. Make sure a snooze is left on our email suggesting times. Once a blocked or permanent failure email is sent, follow the "Invalid email" steps above.
- If an email could not be sent to the customer, forward delivery failure notification to support@claralabs.com with a note that email could not be sent to the customer.

If a non-pre-approved participant requests to schedule a meeting

If you see "Ask for customer's approval" button **after selecting attendees**, proceed as stated below.

1. Go through the **ASK FOR CUSTOMER'S APPROVAL** steps, using "Ask Customer for Confirmation" template.
2. Reply to the participant using the "**Non-pre-approved meeting request**" template.
3. If the customer approves, use the **CUSTOMER HAS APPROVED** steps and proceed with scheduling.

If a participant wants Clara to keep scheduling even when the customer will no longer attend

1. Politely refuse by using the "**Participant wants to keep scheduling without customer**" template.

If you don't know the name of one or more participants

1. If you can reasonably figure out the name based on the email address, go ahead and annotate the name accordingly. For example, “joe.smith@company.com = Joe Smith; jane@company.com = Jane.
2. If you can’t, don’t enter a name into Exo. Instead, annotate the email address as the name.
3. If no time has been confirmed yet, ask them for their name. In the **Composer Step**, tweak Exo templates, depending on whether you're scheduling with one participant or multiple participants.

ONE PARTICIPANT

Hi there,
{Standard Exo verbiage…}
Also, would you please provide your name so I can address you properly on the calendar invite?

....
MULTIPLE PARTICIPANTS

Hi all,

{Standard Exo verbiage…}

Also, would the following people whose email addresses are listed below provide me with their name so I can address them properly on the calendar invite?

{email address 1}
{email address 2}
{email address 3}… etc.

Thanks!

3. If you're able to confirm a time but still have no name, in the **Times Step**, send invites anyway and annotate the participant’s email address as their name. In the **Composer Step**, tweak Exo templates, depending on whether you're scheduling with one participant or multiple participants.
4. Process without any snoozes (“archive” in Clara lingo).

ONE PARTICIPANT
Great! I just sent a calendar invite with details.

Please provide your name, and I'll update the invite accordingly.
....
MULTIPLE PARTICIPANTS
Great! I just sent a calendar invite with details.

For those of you whose name doesn't appear, please just pass that information along so I can update the invite.

5. If someone provides their name, update the invite.
6. Archive.

If Clara is scheduling with a coordinator but doesn't have the participant's email address

1. Ask for the email address by customizing one of the Exo templates.

Hi {Coordinator},

{Standard Exo verbiage…}

Also, may I please have {Participant's} email address for me to include in the calendar invite?

2. Keep scheduling even without the participant's email address.
3. Send an invite if possible, even without the email address. The invite will go to the participant’s coordinator. Archive.

If Participant A wants to add Participant B

1. Add Participant B to the Meeting Creator and include in scheduling efforts.
2. Give the customer a heads up using the "**Participant requests to add participant**" template and tweak accordingly.

If the customer later responds that they would prefer to connect only with Participant A, remove participant B and proceed below:

1. Use the Acknowledge Information template to reply to customer.
2. Respond to the participant with the "**Customer declines request to add attendee**" template.

If Participant A wants Participant B to take over

1. Remove Participant A from the Meeting Creator and add Participant B.
2. Send a separate email using the “Acknowledge information” template to Participant A in addition to the email suggesting times to Participant B.
3. Give the customer a heads up using the "**Participant requests handoff**" template.
   However, if Exo detects a codeword with the specific verbiage “***accommodate the participant***” as an instruction, do not give the customer a heads up.

If Customer A wants Customer B to take over

1. Remove Customer A from the Meeting Creator and add Customer B.
2. Send the “Acknowledge information” template to Customer A
3. Give the customer a heads up using the "**Participant requests handoff**" template.
   However, if Exo detects a codeword with the specific verbiage “***accommodate the participant***” as an instruction, do not give the customer a heads up.

If someone among a group of participants does not need to participate

1. Remove participant from the Participants Step and continue scheduling only with the other participants.
2. Send a separate email using the “**Acknowledge information**” template to Participant A. Continue to schedule with all other participants, as necessary.
3. If they are a participant (not a customer), inform the customer using the "**Participant will not participate**" template.

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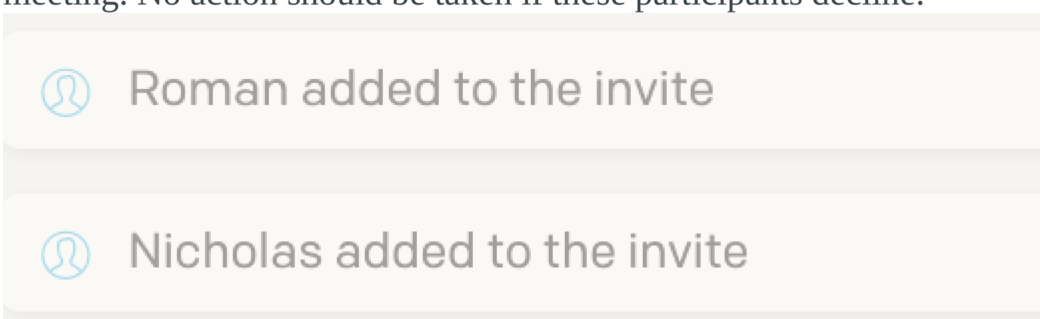
Participants that customers have added to the invite

Sometimes, customers add participants to the invite on their own. In the Exo timeline, this is indicated as “{Name} added to the invite,” as shown in the screenshot below. These participants won’t yet appear in the list of attendees in the Participants Step. Add them only if the customer explicitly requests that Clara include them in the meeting. No action should be taken if these participants decline.



If a participant CC's other participants in their response

Sometimes, in their response to Clara's email, a participant will add other email addresses to the conversation.

1. The participant loops in another one of their email addresses:
    i. Add the new email address(es) in the Participants Step (Only remove the other Participant profile if they request to only be contacted on the CC'd email address.)
    ii. Copy over any information from their other contact (Company name, Phone number, etc)
    iii. In the Event Step, remove the duplicate name in the event title
    iv. In the Composer Step, remove the duplicate name in the template

2. The participant loops in other participant's email addresses and **context clearly indicates** they should be included in the meeting (For example: "Adding in Sarah, as she can help with some of the numbers.", "I've CC'd Noah to join us." or "that time works for us"):
    i. Add the new email address(es) in the Participants Step and annotate accordingly
    ii. In the Composer Step, send the "Participant requests to add participant" to the customer to let them know new participants will be joining the meeting
3. The participant loops in other participant's email addresses and context does **NOT** indicate they should join the meeting
    i. You do not need to add them to the Participants Step and can continue scheduling with the current attendees

If Clara is asked to set an attendee as optional

1. If Clara is not already the coordinator of the optional attendee, set Clara as the coordinator. This will ensure that no emails are sent to that attendee.
2. In the Times step, open the full calendar view. If Clara has access to any of the optional attendee's calendars, toggle them off.
3. If the optional attendee later declines the invite, ignore it. If the optional attendee requests to not be included, please see here.

If an active customer wants to schedule a meeting with an inactive customer

If a customer is inactive, this will be indicated with a grey star next to their name. If you can see their calendar in the Times Step, treat inactive customers as colleagues and set Clara as that person's coordinator.

They may still have preferred meeting times, but you can toggle that off by selecting the bubble next to their name on the full calendar view. You don’t need to take an inactive customer’s preferred meeting times into account when scheduling.

If an inactive customer or colleague is included in scheduling and we do not have calendar access

When customers are deactivated in our system, we no longer have access to their calendar. In some instances, they do have calendar sharing with their colleagues, so we may be able to see their calendar.

If it has been confirmed in the Times Step that we do not have access:

1. Remove Clara as their coordinator
2. In the Composer Step, confirm that we are addressing them when suggesting times

❗️

If a customer provides instructions that conflict with a codeword, follow their instructions over the codeword intent.

Channel

[Suggest Edits]

Channel & Duration step includes the following actions:

- Set the location for where everyone will meet, whether it’s in-person or virtual
- Set how long they will be meeting for

Meeting Defaults

By default, Clara will schedule every request as a virtual meeting ***unless*** it is explicitly clear that an in-person should be scheduled. Some phrases that indicate that Clara should schedule an in-person meeting are listed below.

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Please remember that most of these phrases should also be combined with additional context that clearly states that it should be scheduled as an in-person meeting.

- in person, in-person
- meet in person
- schedule at {location}

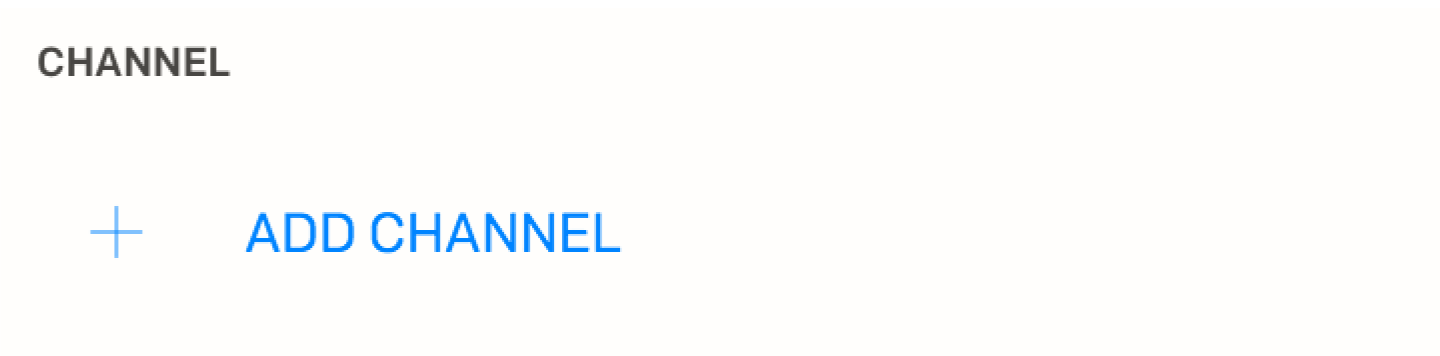
- swing by
- come by, come in
- drop by, drop in
- stop in, stop by
- pop in
- pay a visit
- take a walk, meet for a walk

For example:

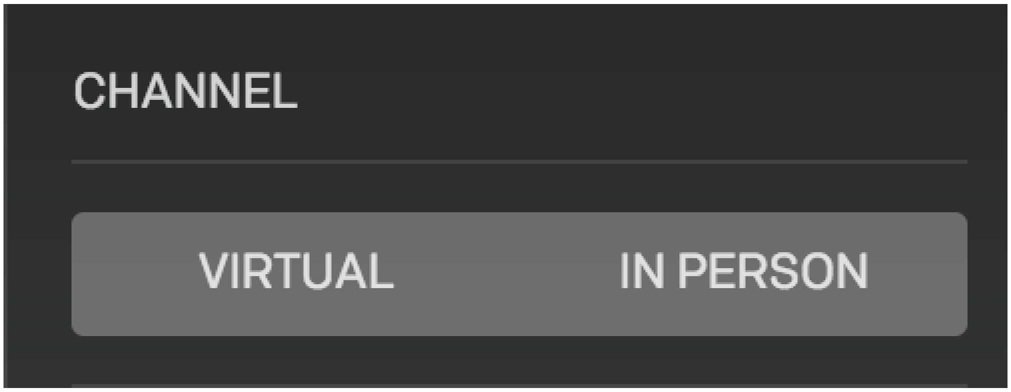
- "Clara, I want to meet with {Participant}" → virtual meeting
- "Clara, schedule this in person with {Participant}" → in-person meeting
- “Clara, please schedule this at Blue Bottle Coffee” → in-person meeting
- "Clara, {Participant} and I will meet over Google Hangouts" → virtual meeting
- "I look forward to meeting you, {Participant}! Clara, please schedule and note that {Participant's} time zone is ahead by three hours." → virtual meeting
- "We should get together next week for lunch. Clara can help schedule." → in-person

If a customer provides instructions that conflict with a codeword, follow their instructions over the codeword intent.

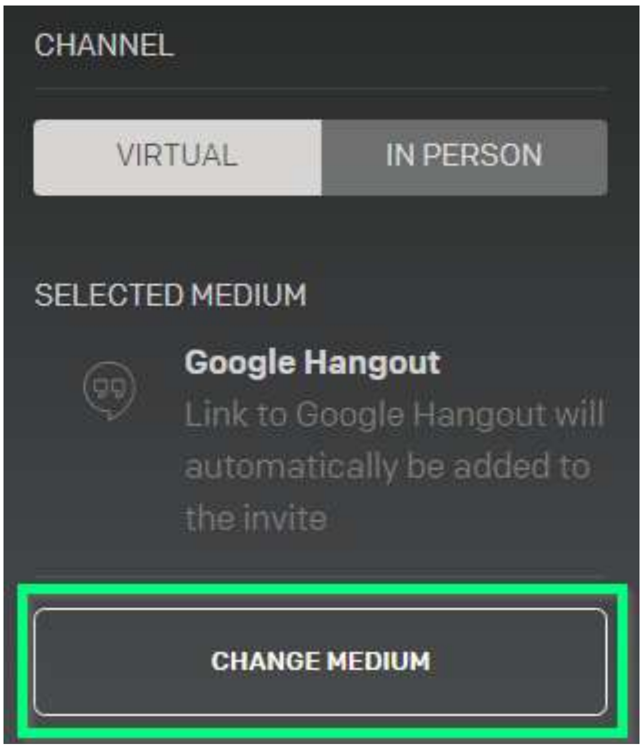
Channel selection



Clicking on "Add Channel" will give you these options



To change the channel or medium, click on "Change Medium".



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Double-check every annotation in the Channel Step

If Clara is still in the middle of scheduling and has yet to send an invite, do not assume that the previous CRA's annotations are correct or still valid. ***It's your responsibility to ensure the accuracy of any annotated information. Please read and annotate carefully.***

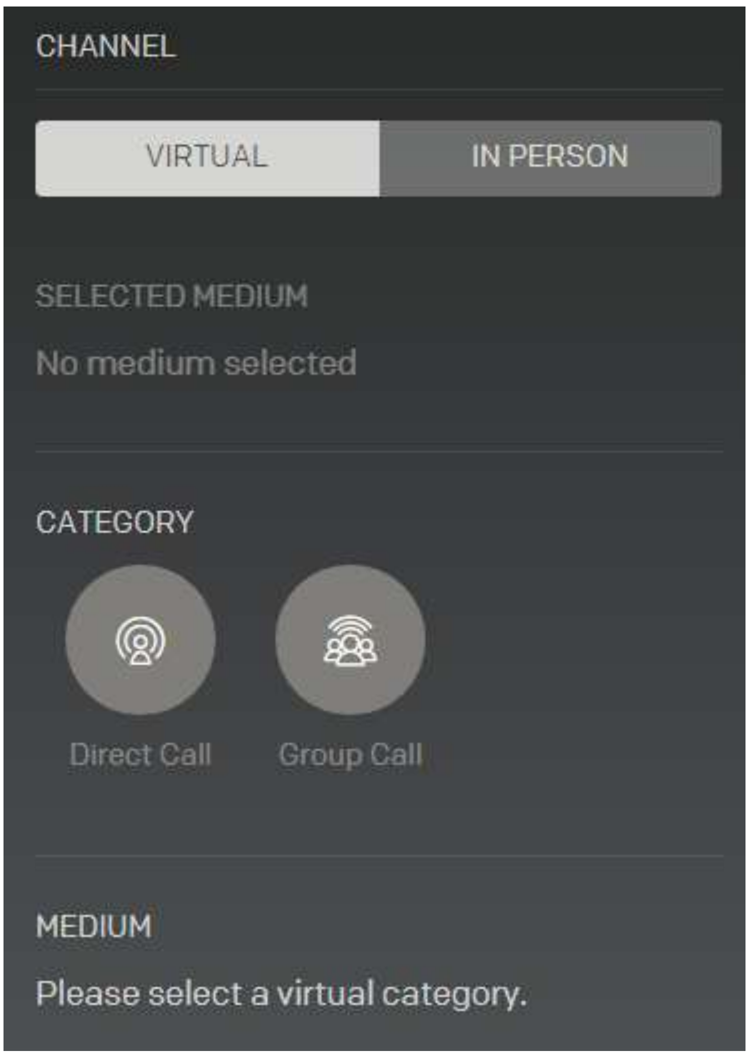
- It's possible that the CRA made a mistake.
- It's possible that the customer updated their preferences.

- It's possible that the new primary attendee's preferences are different from the original primary attendee's. Keep in mind that when a customer hands off the meeting to another customer, Exo will *not* automatically update Channel Step annotations based on the new customer's preferences.

Please update channel and/or duration annotations as necessary.

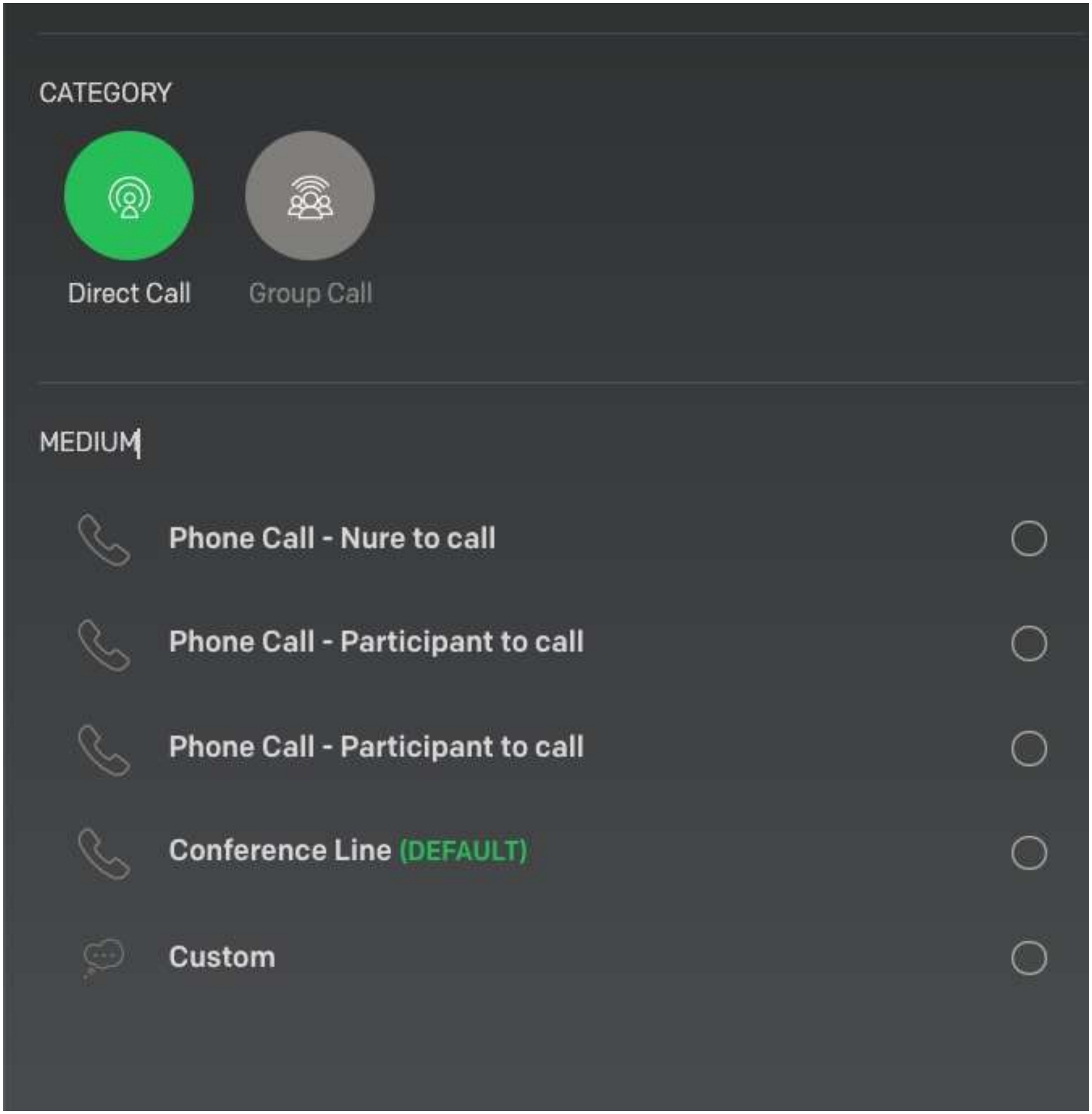
Virtual Meetings

Clicking on "Virtual" will give these options:



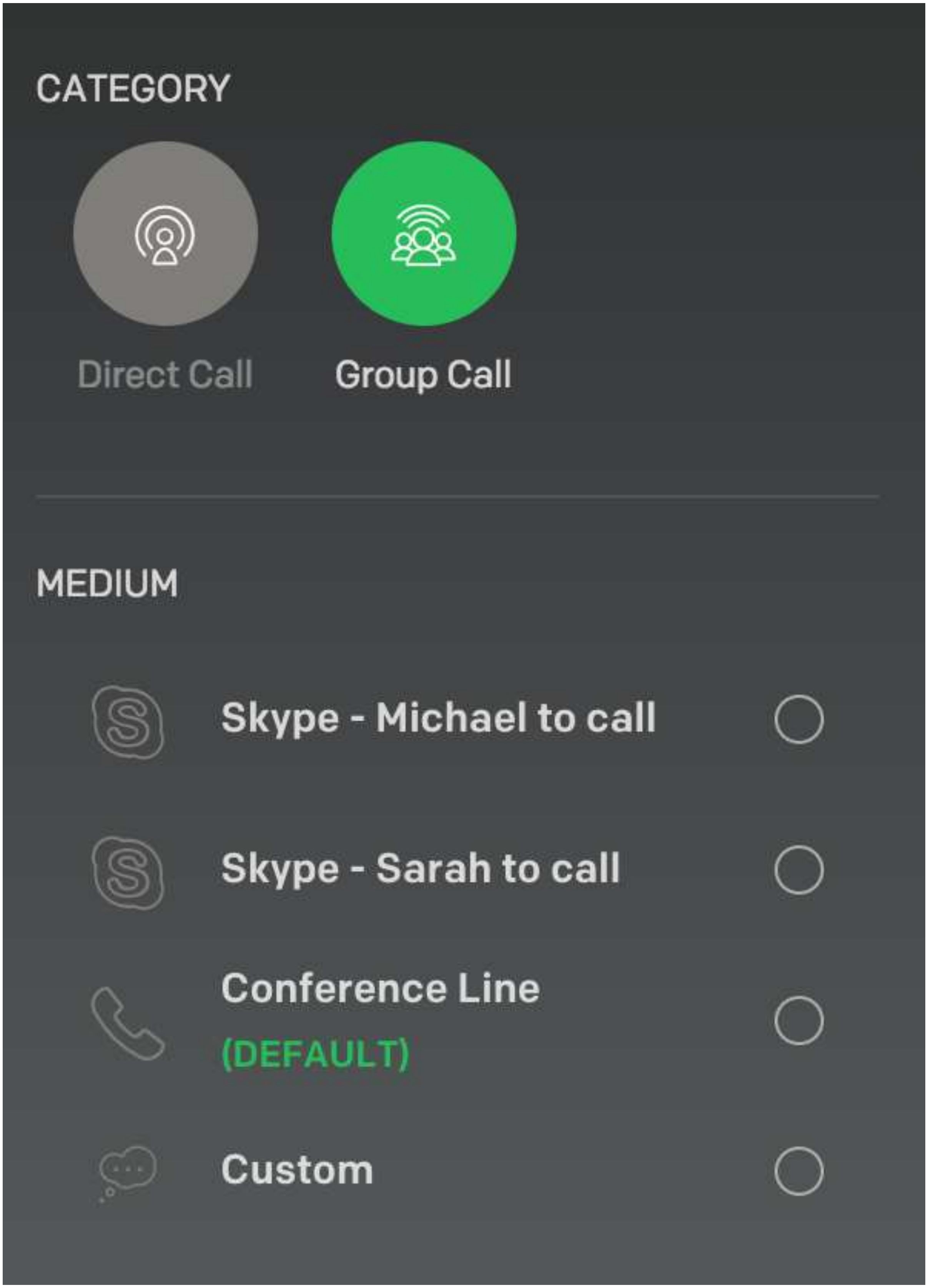
Direct calls

Direct Calls are between two people only. Unless instructed otherwise, use the customer’s default (indicated in green).



Group Calls

Group calls are between three or more people. Unless instructed otherwise, use the customer's default (indicated in green).


CATEGORY
Direct Call
Group Call
MEDIUM
Skype - Michael to call
Skype - Sarah to call
Conference Line
(DEFAULT)
Custom

Never choose the “phone” or “Skype” option for calls with more than 2 people, even if it’s the default. Choose any other option — such as a conference line, Zoom, Google Meet or Teams — that doesn’t require Clara to ask for multiple call details. And if there isn't one, ask customers for one using the “**Ask customer for group call preference**" template. If the customer insists on a phone call with more than 2 people, it should always be "Participant to call Customer", as we do not gather phone numbers from participants.

Please note: The symbols next to the channel are not accurate. For example, a static Zoom link will appear under the "Conference Line" option, but has a phone next to it, like the Direct Call option. Please do not rely on the symbols to accurately represent what the option is.

Custom Channel

If a participant provides a link that has details other than the URL (dial-in numbers, links other than the meeting, etc), ONLY include the link and Meeting ID and/or Password. These are the only two additions that should be included in the custom channel.

Do not add a prefix (Zoom:, Teams:, etc) to the beginning of the link. (This will make the link invalid (unclickable) for the customer and create confusion.)

Guidelines For Annotating Virtual Meeting Options

If email context specifies a particular option, annotate that option. If email context specifies no particular option, annotate the customer’s default.

Example 1: If “phone” is specified anywhere in email context (e.g., phone call, phone screen, phone interview, phone chat), select a “phone call” option.

- If email context specifies who will initiate the phone call, whether the customer or the participant, select that option.
- If email context does not specify and one of the phone call options is the default option, use the default.
- If email context does not specify and neither phone call option is the default, use "Customer calls participant”.

Example 2: If “video” is specified anywhere in email context (e.g., video call, video conference), select a video-compatible option. These include Google Meet, FaceTime, Zoom, UberConference, Join.Me, GoToMeeting, BlueJeans, Microsoft Teams, etc.

- If email context specifies which video option, select that video call option.
- If email context does not specify and one of the options is the default, use the default.
- If email context does not specify and none of the video options are the default, select any video call option.

If there is no customer on the job (and therefore no default option), see “Channel Step” considerations for Primary Attendees here.

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Skype

Do not select Skype unless that option is explicitly requested.

If A Requested Channel Is Not Present in the Channel Step Options

If an option specified in email context doesn’t exist in the customer’s preferences, select “custom” and manually type it in followed by TBD (e.g., “FaceTime: TBD” or “Zoom: TBD”).

In the Composer Step, ask the person who requested that option to provide its details.

- Example: If the participant asks for a Zoom call but the customer does not have that option, ask the participant for their Zoom details.

Zoom, Google Meet, and Microsoft Teams

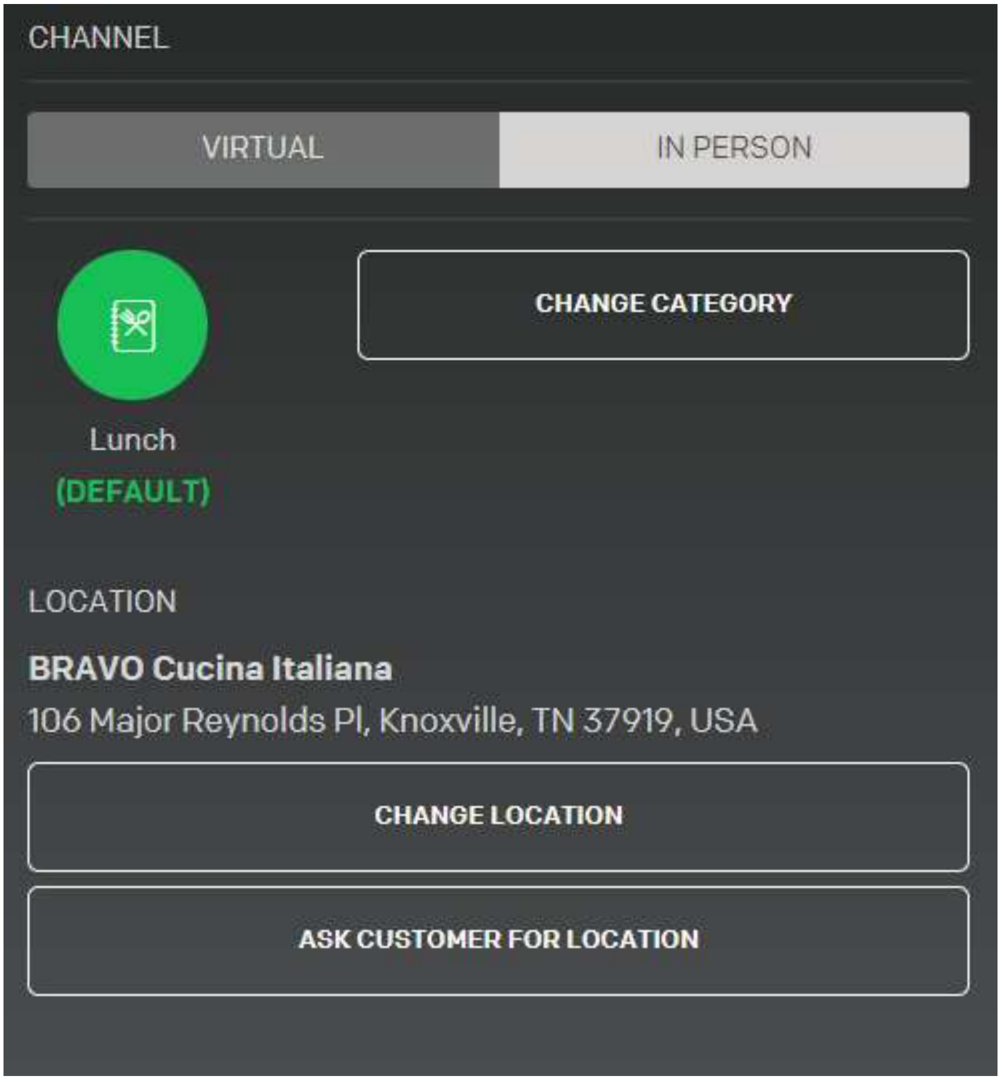
Customers can configure Google Meet, Microsoft Teams and Zoom links in a few ways:

- Zoom/Google Meet Static links - Listed as a "Conference Line" option (click to verify that it's a Zoom/Google Meet link)
- Zoom dynamic links - Listed as its own "Zoom" option
- Google Meet dynamic links - Listed as its own “Google Meet” option
- Microsoft Teams dynamic links - Listed as its own "Microsoft Teams" option
- If static, the same link will immediately appear on all confirmation emails when you send calendar invites.
- If dynamic, your confirmation email will say "Zoom Meeting | Link to be provided", "Google Meet | Link to be provided" or "Microsoft Teams Meeting | Link to be provided." Do not ask anyone to provide the link; if nothing more needs to be done, archive the job. Before the meeting takes place, Exo will automatically update the calendar invite with the dynamic link.

Note: **Any** customer can add a static link. **Not** every customer can add dynamic links to their account. If the customer specifically asks for dynamic links, please loop in Support to assist.

In-Person Meetings

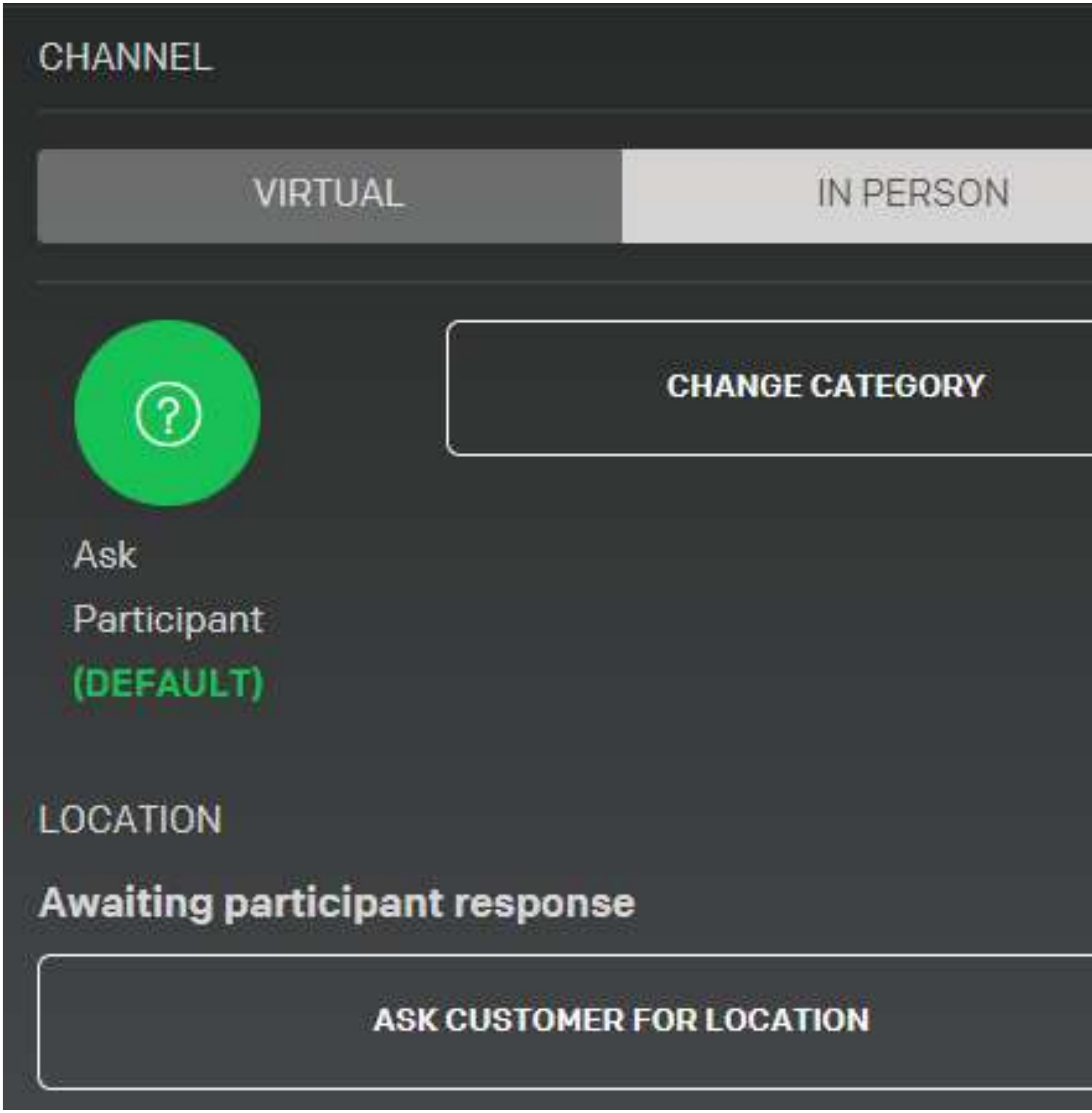
When you click on In Person for the channel, Exo will automatically populate the customer's default location category.



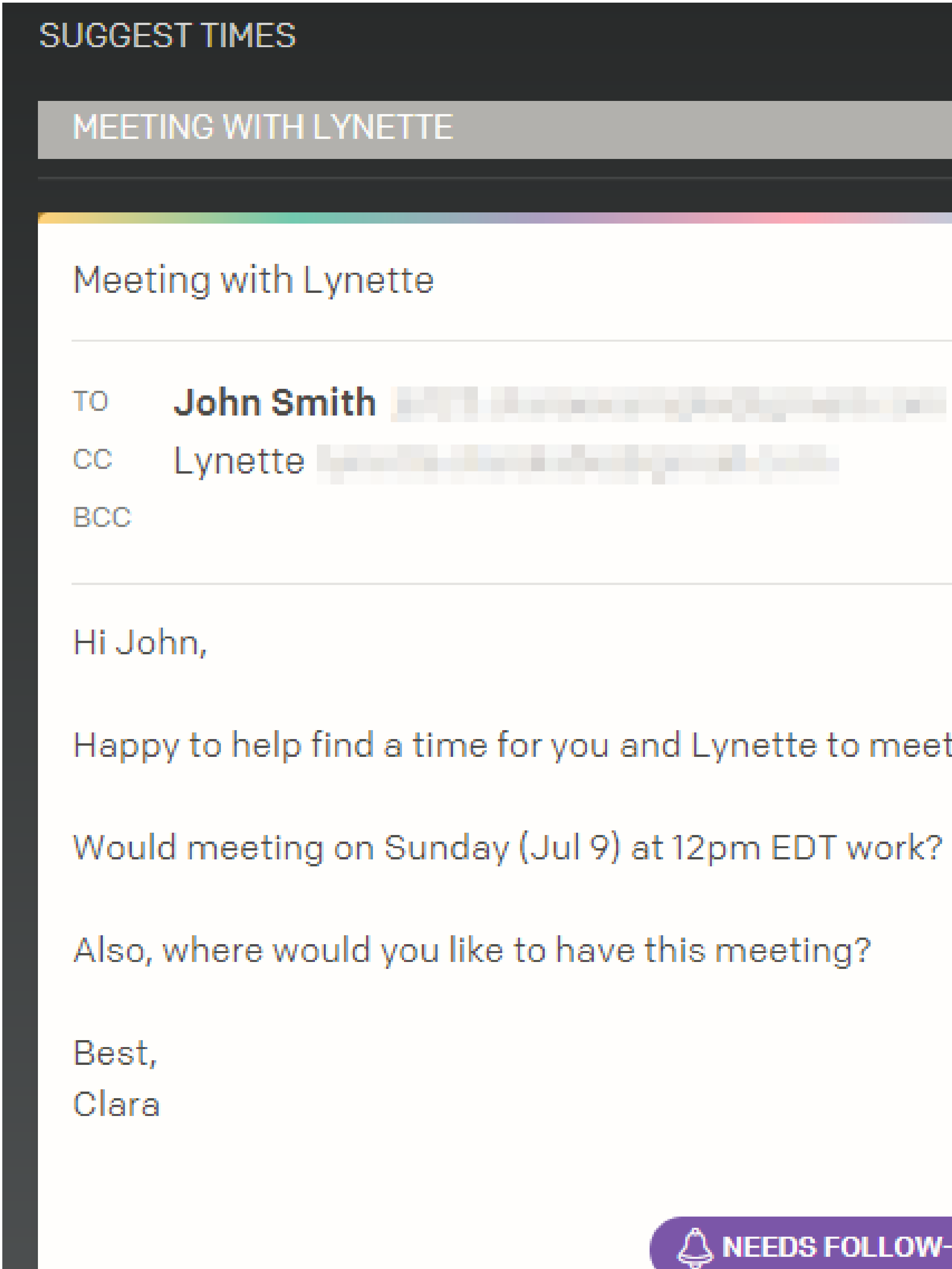
In this example, the customer's default location category is Lunch. The default location for this category is BRAVO Cucina Italiana.

If a customer's default location category is "Ask Participant", Exo will show the following

! □
This option overrides the customer's other preferences, unless a specific location is mentioned.



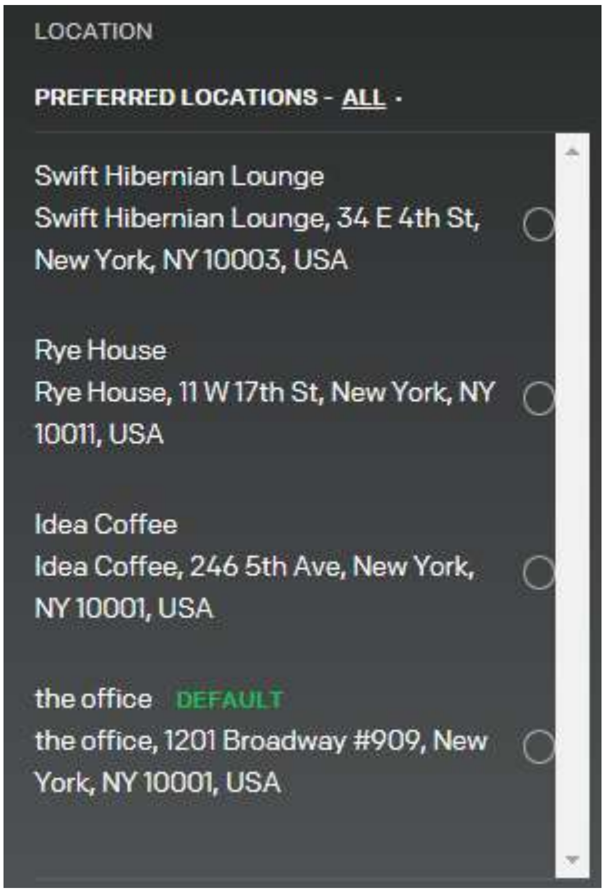
This option will generate verbiage in the Composer Step, asking the participant where they would like to meet, as shown below.


SUGGEST TIMES
MEETING WITH LYNETTE
Meeting with Lynette
TO John Smith
CC Lynette
BCC
Hi John,
Happy to help find a time for you and Lynette to meet
Would meeting on Sunday (Jul 9) at 12pm EDT work?
Also, where would you like to have this meeting?
Best,
Clara
NEEDS FOLLOW-

When a location is provided, make sure to select the correct meeting type and enter the location.

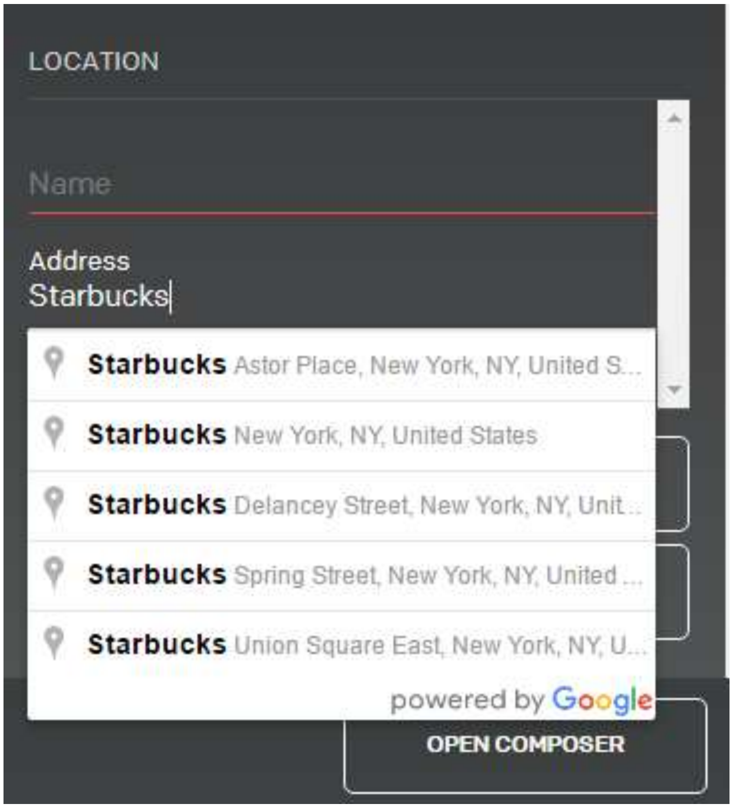
Clara is provided with the name of a location, but not the address

You can view all of the customer's locations at one time by clicking "Add location" and then "ALL."

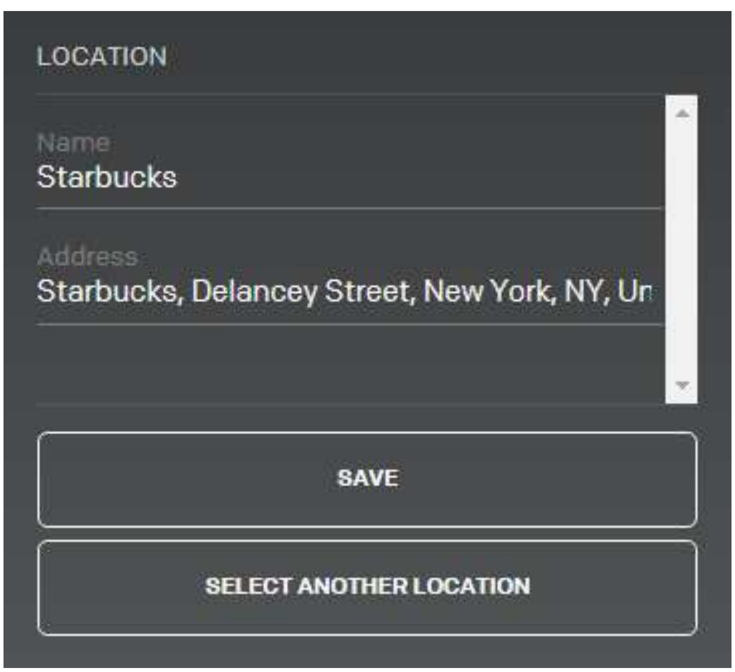


If you're unable to find the referenced location as shown above, or if a participant provides the name of a location, you can look up the address as follows:

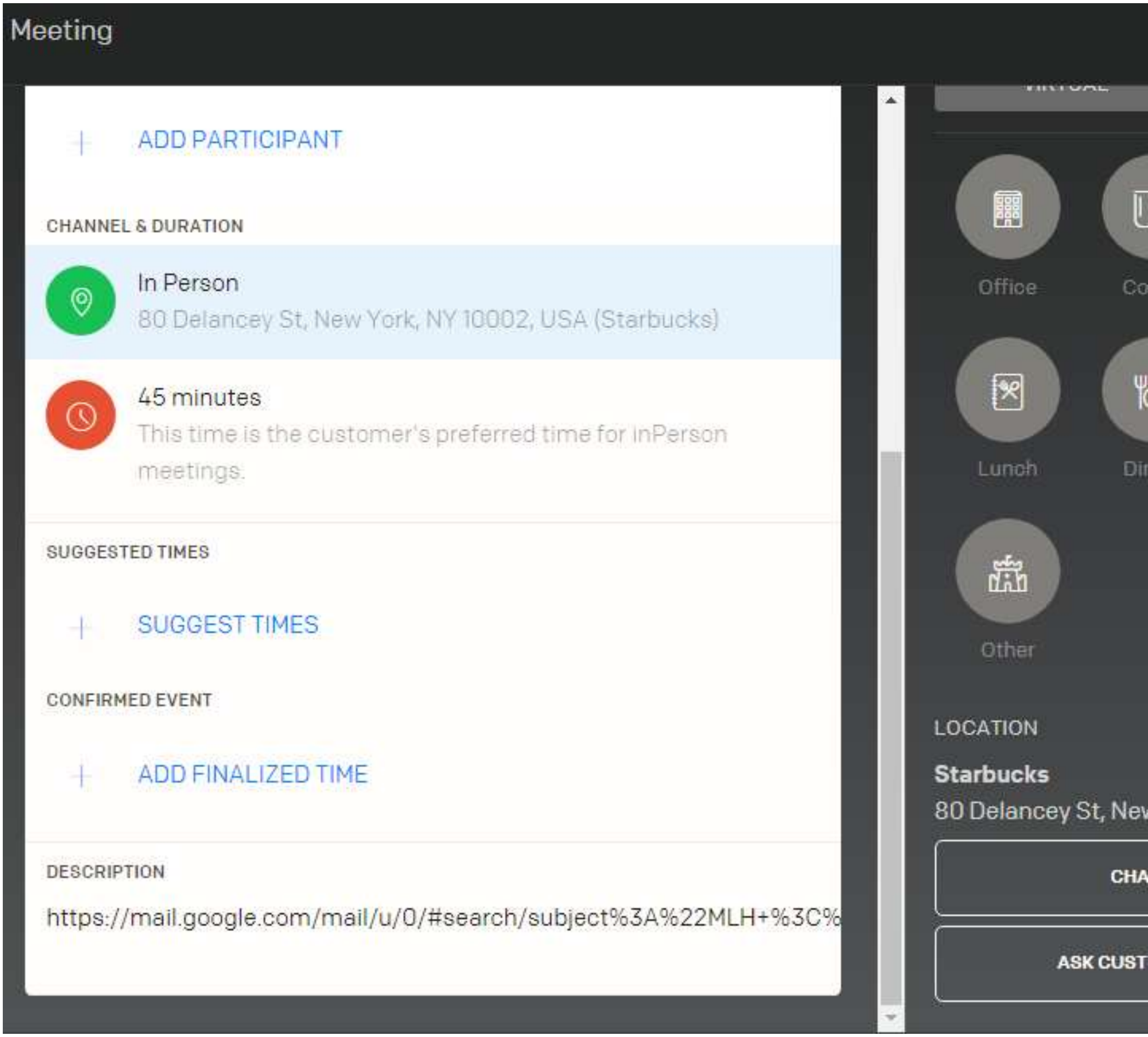
1. Select "Custom Location."
2. In the "Address" field, start typing the name of the location.
3. If the address includes additional details such as a building, floor, or apartment number, add it to the Name line of the address.



Select the option you'd like to choose. Note: You may need to provide some location information (Starbucks San Francisco, Starbucks Menlo Park, etc) to narrow down the choices.



Click "Save" and you'll see the location information populate in Exo. Additional details such as a building name or suite number can be included in the 'name' field before clicking 'save'.



Clara must schedule an in-person meeting, but does not yet know the location

1. Make sure the location is TBD.

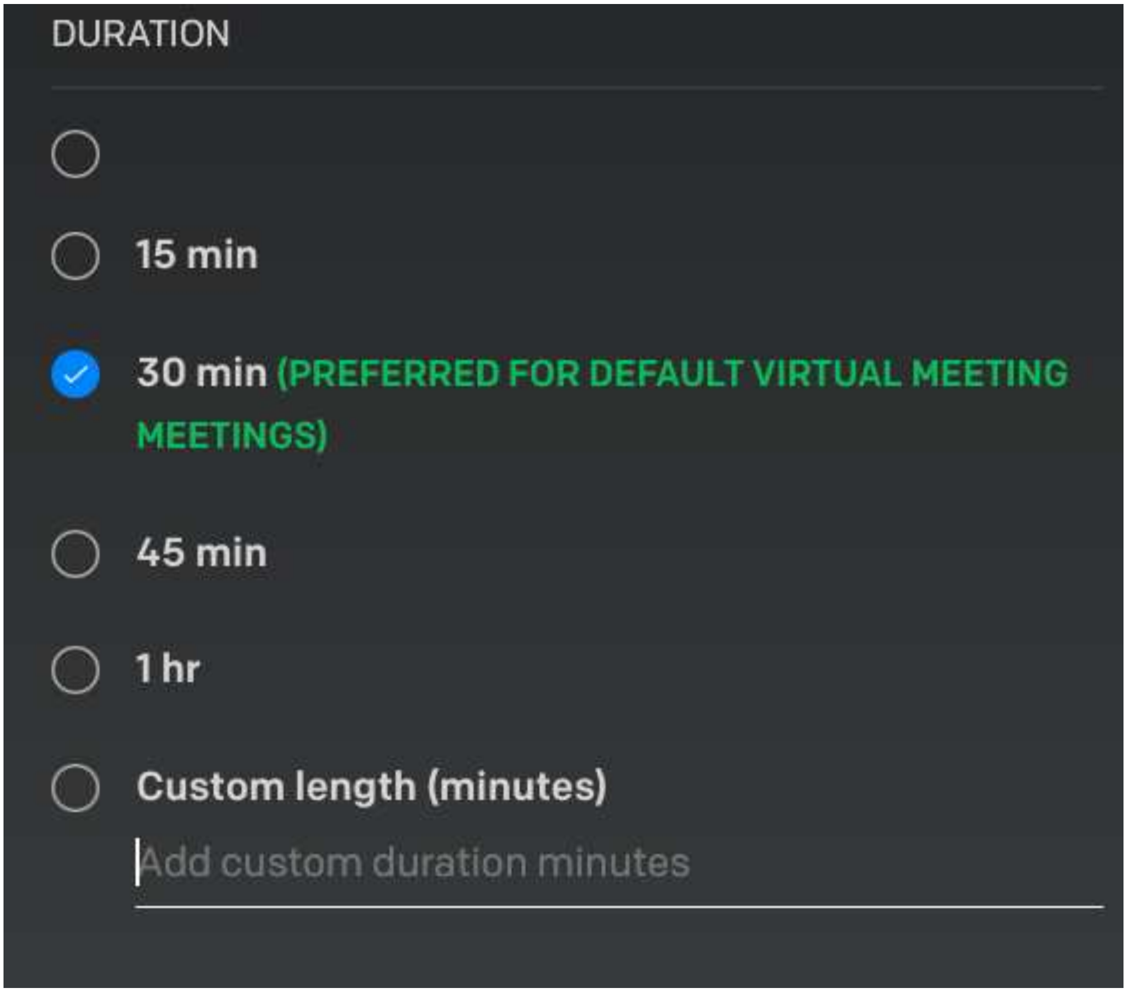
2. In the Composer Step, ask the customer for a location using the "Ask Customer for Location" template.

Other In-Person Notes

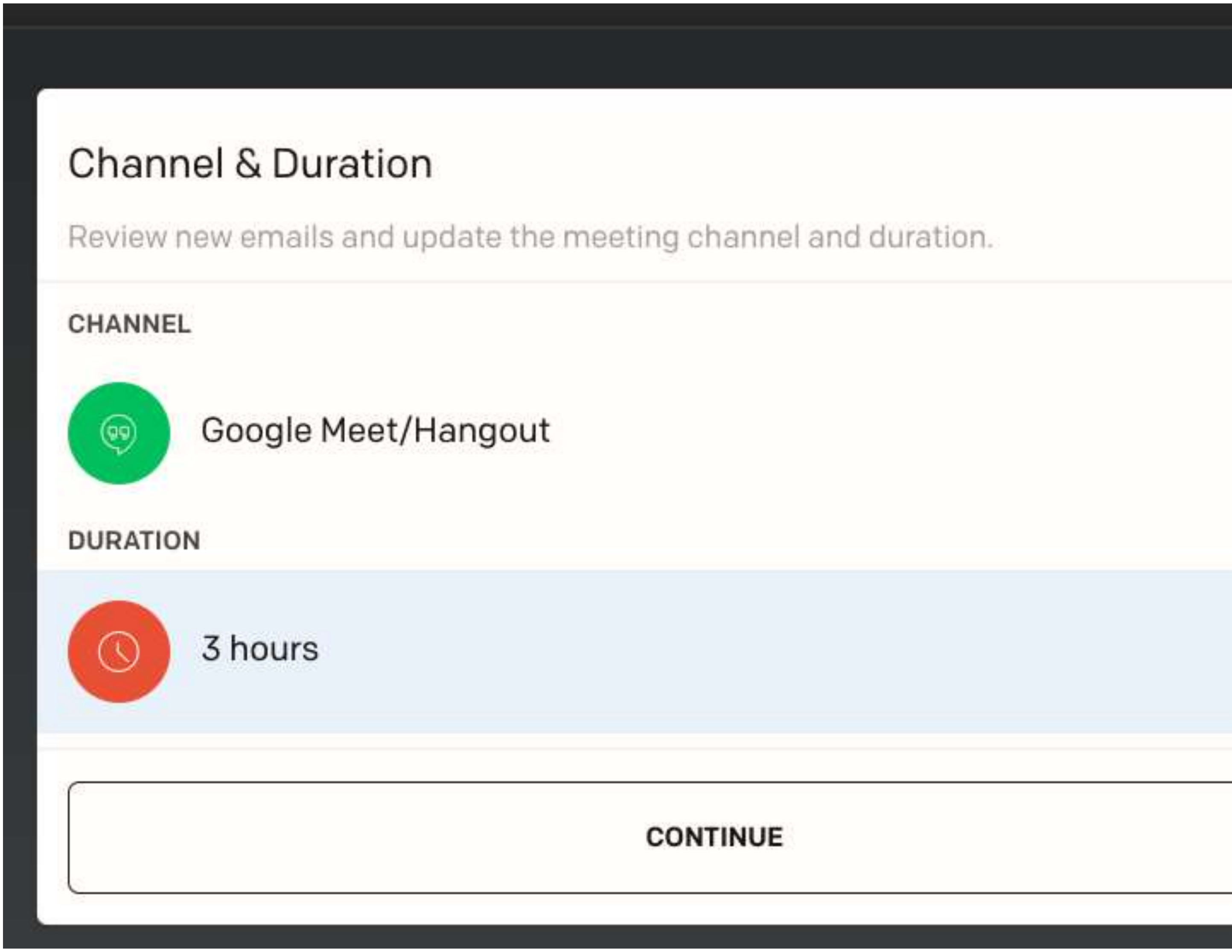
- The “Ask Customer For Location” button doesn’t currently work, so you’ll need to select “Location Unknown” in the Channel step and select the “Ask Customer for Location” template in the Composer step to ask the customer where they would like to meet.
- To specify a different location, click "Change Location" and select the correct address.
- To change the meeting type (whether office, coffee, lunch, dinner, etc.), click "Change Category" and select the appropriate category. Then click "Add Location" to see all location preferences for that category.
- If you receive a location and the participant later confirms a previously suggested time that turns out would not afford the customer enough travel time, suggest new times. But if, in the Times Step, you see that Clara has already scheduled the in-person meeting with "TBD" on the invite, and it turns out that the location would not afford the customer enough travel time, use the "**Notify customer time doesn’t afford travel**" template to ask the customer how to proceed.
- If the customer prefers to change the venue, make sure travel time is sufficient. If it is, update the invite, let the participant know using the "**Share location change with participant**" template.

Duration

Duration is how long a meeting will last. Like the channel, customers have a default, which should be used unless email context from either the customer or participant states otherwise.



When entering a manual duration (i.e., a “Custom length”), format the number in minutes vs hour and minutes. For example, if a customer asks to meet for 3 hours, enter 180 minutes.



To update the duration after it has been set, change the duration to what is being requested. If an invite has already been sent, you'll need to follow the steps here to ensure the invite is also updated to the new duration.

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Note: 24 hours (1440 minutes) is the maximum that can be annotated, so if a customer asks Clara to calendar an event longer than that, loop in Support.

Accommodate participants

If a participant requests changes to any of the following, accommodate them and update the Meeting Creator accordingly. Give the customer a heads-up with the appropriate template:

- **Duration** (*E.g., "This introductory call usually takes a hour and a half."*)

  Template: "**Participant requests duration change**"
  Note: When a colleague initiates a meeting and requests a duration different from the customer's default, if the duration is mentioned in the previous context, there is no need to send the 'Participant requests duration change' template.
- **Virtual Channel** (*E.g., "Skype is easier for me to use than Google Hangouts."*)

  Template: "**Participant requests virtual details change**"
- **Who calls who** (*E.g., "It is usually easier for me to call guests directly." or "Can she call me?"*)

  Templates: "**Participant requests to initiate call**" or "**Participant requests customer initiate call**"

However, if Exo detects a codeword with the specific verbiage "***accommodate the participant***" as an instruction, do not give the customer a heads up.

Changes to a meeting that still require customer approval

If a participant suggests one of the following, let the participant know we'll look into their request using the "**Acknowledge participant request**" template and email the customer for approval, snoozing according to their preferences:

- **High-level channel type - virtual to in-person, or in-person to virtual** (*E.g., "I'd prefer to conduct the interview in person instead of by call." or "Can we speak over phone instead?"*)

  Templates: "**Participant requests in person meeting**" or "**Participant requests virtual meeting**

If this is approved by the customer, it is imperative to check that the duration is correct and update as necessary. Most customers have a different virtual duration preference than in-person duration.

- **In-person location** (*E.g., "I can't really get away from my office on any day - let's plan on her coming to my office."*)

  Template: "**Participant proposed location**"

Participant asks for customer's location and/or virtual contact details

Scenario: Participant wants to know where customer is based.

1. Respond with information found in customer's preferred locations.
2. If no information is found, ask the customer.

Scenario: Participant wants to know customer's virtual contact details (e.g., phone number, Skype ID).

If these details can be found on the customer's email signature, provide them to the participant. Otherwise, check the customer's virtual preferences in Exo.

Rescheduling when the participant sent the invite/link

Scenario: Customer/Participant asks to reschedule an event that we originally helped schedule, but the participant sent the invite or passed along a link to use.

1. In the Channel Step, remove the old link and use a Custom channel with "TBD"
2. In the Composer Step, add the following verbiage to the "Reschedule" template: "If you could kindly remove your invite until a new time is confirmed, it would be greatly appreciated."
3. When a new time is confirmed and if the participant has not yet sent a new invite, confirm the time and ask them for their virtual details with the following verbiage: "If you could pass along your (virtual/Zoom/Teams/Google) details, I would be happy to update the invite."

Two Channel Request

Sometimes, the customer gives the participant the option between a virtual call or an in-person meeting.

1. In the Channel Step, select either the customer's default virtual preference or the customer's requested virtual preference. Set the duration according to the default or the customer's request
2. In the Composer Step, use the **Regular** "Suggest Times" template and add the following verbiage:

i. "Also, I've made this a virtual meeting. If you would prefer to meet in person, just let me know."

If they respond that they do want to meet in person instead of virtually:

1. In the Channel Step, update the Channel and Duration accordingly
2. In the Times Step, if the time they've selected does not work for an in-person meeting (duration and travel time), then suggest new times. Otherwise, confirm the event
3. In the Event Step, select the Autogenerated Title or adjust the Custom Title to reflect the correct location (Call should change to "Meeting"/"Office"/etc)
4. In the Composer Step, if the customer's preference was to ask the participant/customer for the location, make sure there is verbiage and a snooze to follow up for the location

Conference Rooms

Suggest Edits

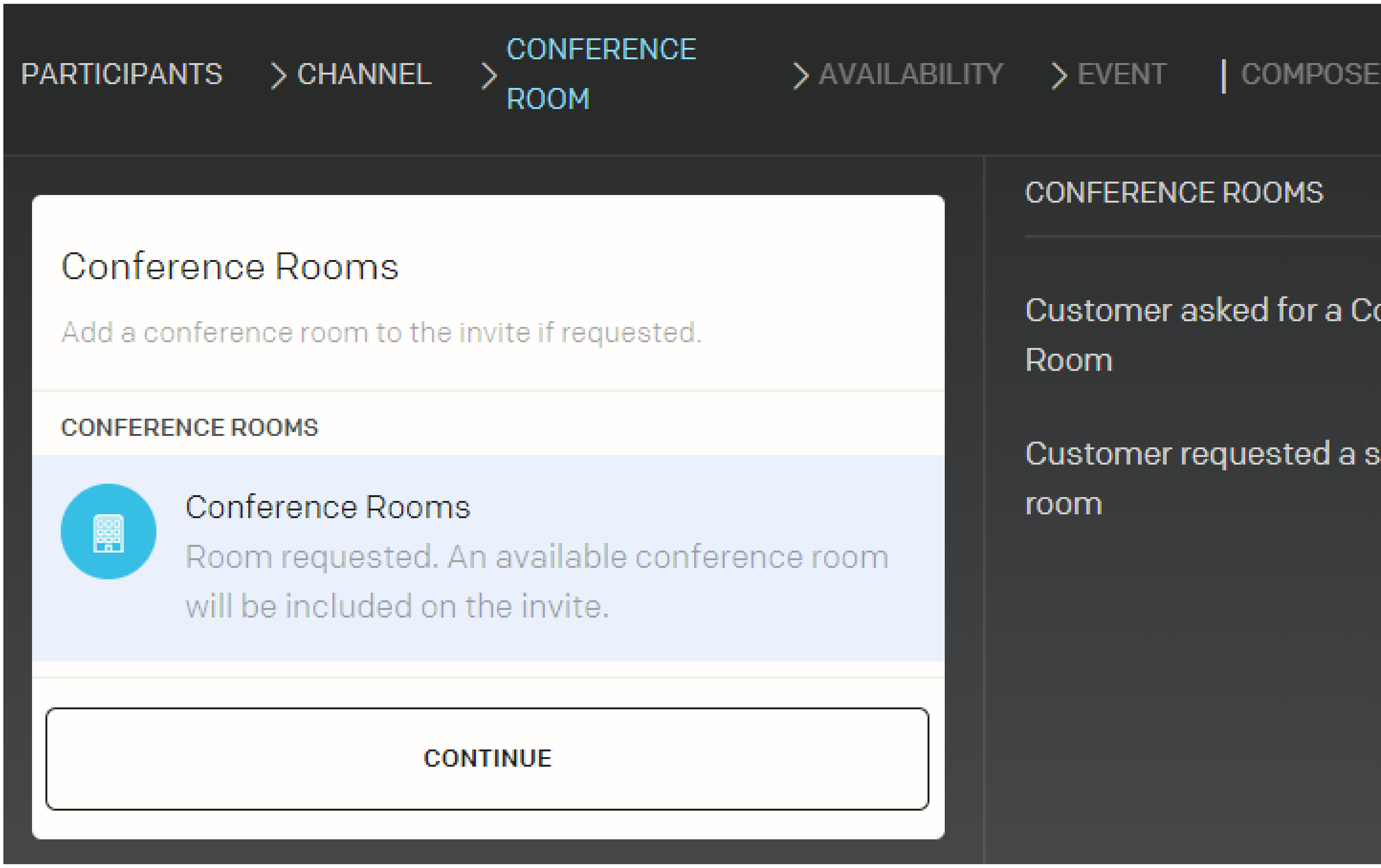
Exo Conference Rooms step includes the following actions:

- Customer asked for a conference room
- Customer asked for a specific room

📄

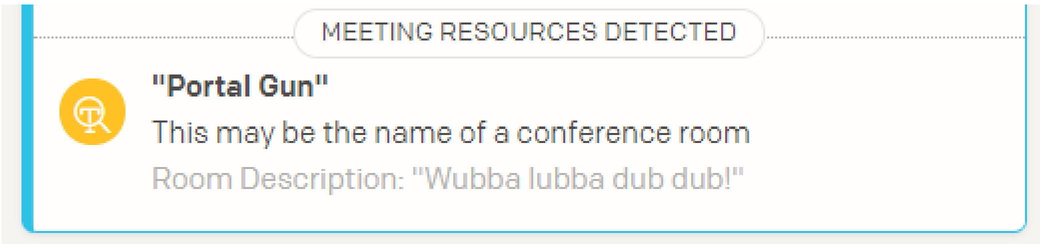
NOTE: This step will only be present for customers that have the feature active.

If a customer *without* this step asks about a conference room, loop in Support.



This feature works in a few different ways:

1. Customer requests Clara to add a conference room, but doesn't specify which one.
2. Customer requests Clara to add a conference room and provides the name of the room.



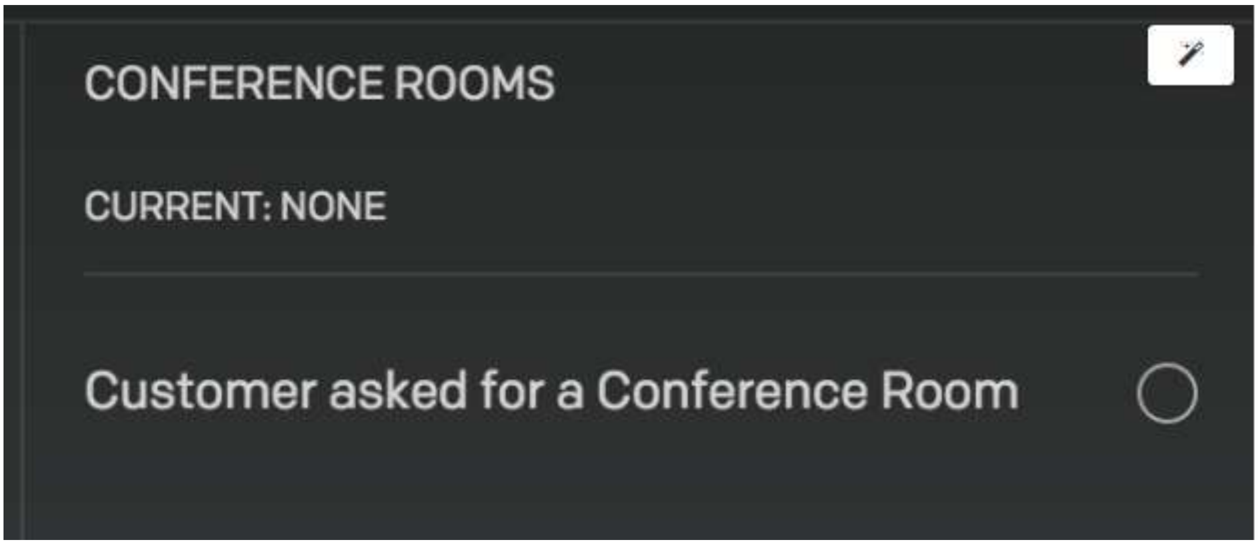
If a customer mentions a room by name, you may see "Meeting resources detected".

3. The customer's preference is for a conference room to be included on: all in-person meetings at the office, all virtual meetings, or all in-person meetings at the office + all virtual meetings. Exo will take care of booking the room for you.

Any attendee can request for a conference room to be added. See guidelines below.

- Inner Circle: Anyone on the customer's meeting permissions list can request a conference room be added **without** giving the customer a heads up.
- All other attendees: If Clara is asked to add a conference room from someone who isn't a customer or part of the Inner Circle, we go ahead and do so and give the customer a heads up using the "**Participant requests conference room**" template.

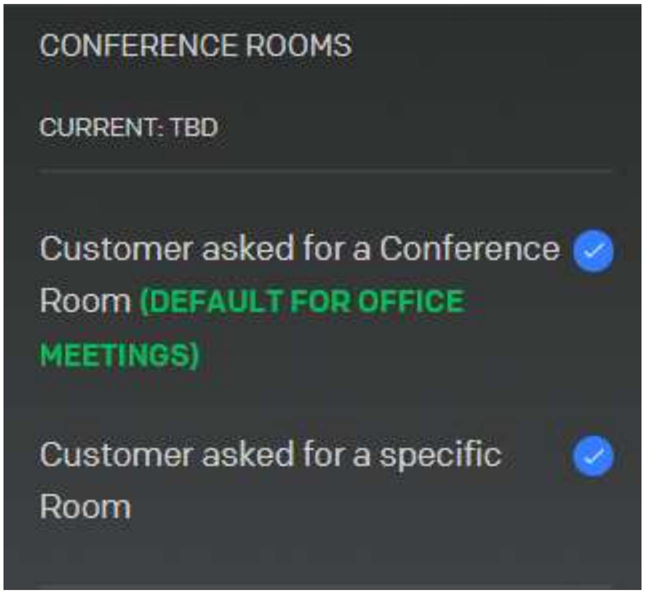
A conference room is requested

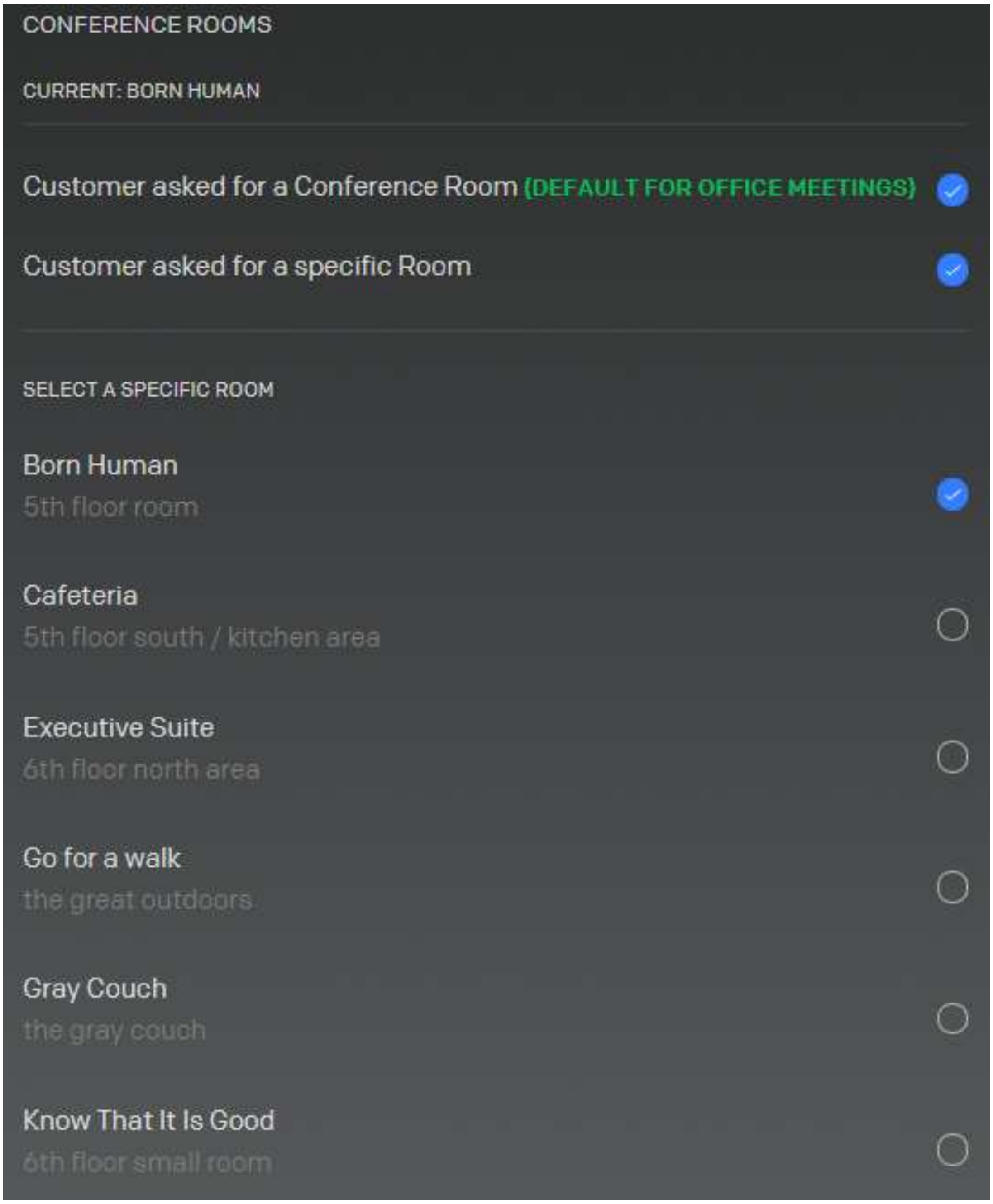


Select this option if a conference room is requested.

You'll notice that the current text will update to say "TBD". TBD means that a conference room will be pulled from the customer's preferences later when it is time to confirm the event. You'll be able to see the name of the conference room added on Review & Finish.

Customer asked for a specific room


CONFERENCE ROOMS
CURRENT: TBD
Customer asked for a Conference Room (DEFAULT FOR OFFICE MEETINGS)
Customer asked for a specific Room



Find the requested room in the list and click on the circle next to it.

On the calendar, you'll be able to see the conference room name under "Other Meeting Calendars". We should make sure that when we are suggesting and finalizing times that the specified room is available. If it is unavailable, you will see a light grey event on the calendar during that time.

Participant asks for a conference room

Accommodate the request and give the customer a heads up using the "**Participant requests conference room**" template.

👍

How to handle...

- If a customer requests a specific conference room after we've finalized a time and that room is not available, select a different conference room from the list and let the customer know we've done so with the "**Specified room unavailable**" template.
  - If a customer requests a conference room after we've confirmed a time and no rooms are available, send the customer an email with the "**No available room for confirmed meeting**" template.
  - If a customer asks for a meeting during a specific time period ("next week") and there are no rooms available during that time, suggest new times and inform the customer with the "**No available room (specified timeframe)**" template.
  - If a customer asks for a meeting but doesn't supply a timeframe and you are unable to book a conference room within a two week window, proceed with suggesting times after the two week window and let the customer know you've done so with the "**If there are no rooms available in the next two weeks**" template.
  - If the room declines the meeting invite and there are no other conference rooms available during the meeting time, use the "**Room declines invite and no other room available**" template.

Times Procedures

Suggest Edits

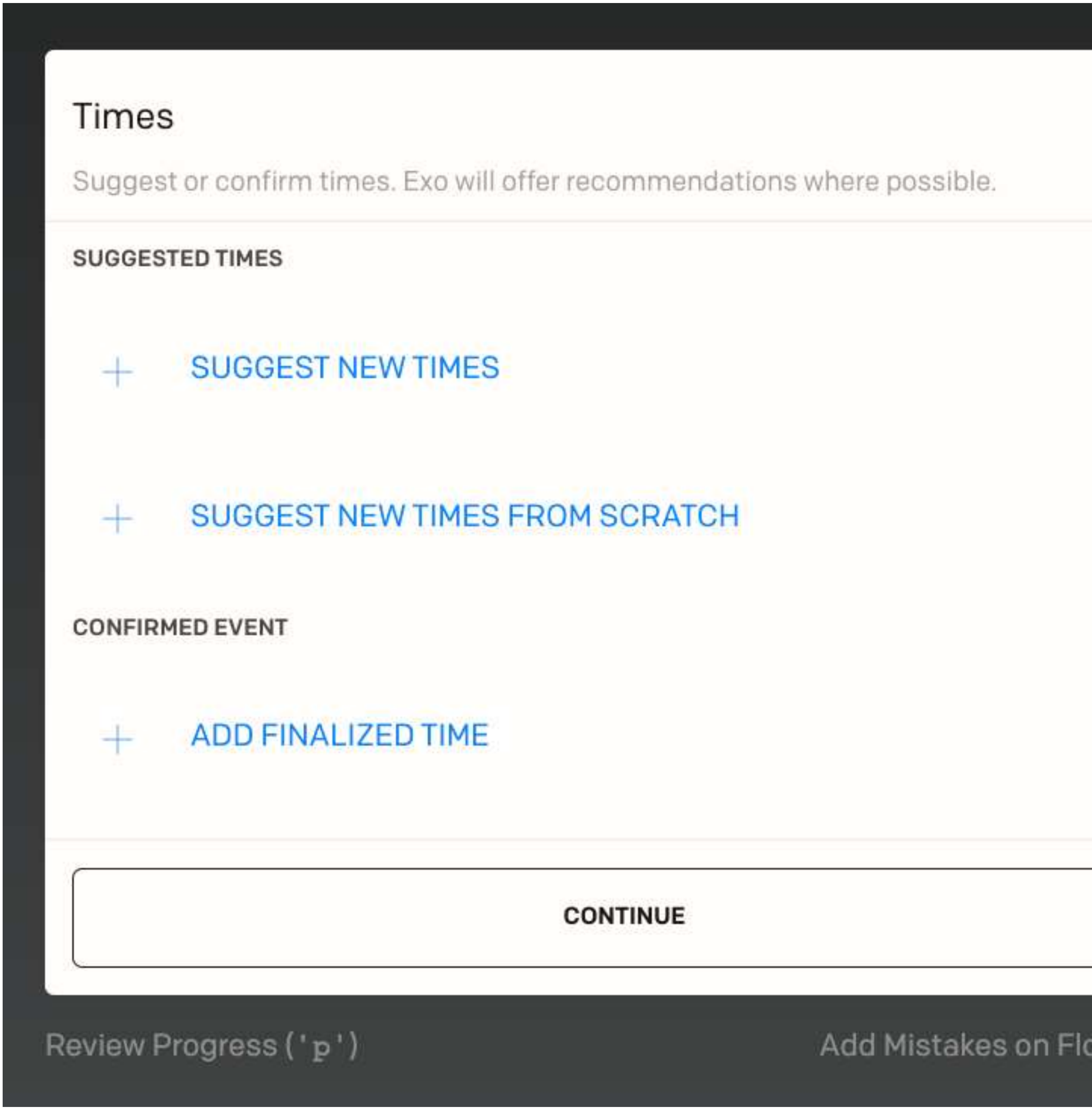
The Times Step is where you will interact with the customer's calendar. The majority of your work in Exo will be here. It's where you'll suggest times, as well as add and remove calendar events. This article is split into 2 parts:

☞ **Times Procedures**
☞ **Times Scenarios**

In Times Procedures, we'll outline the basic ways to process within the Times Step.

Actions

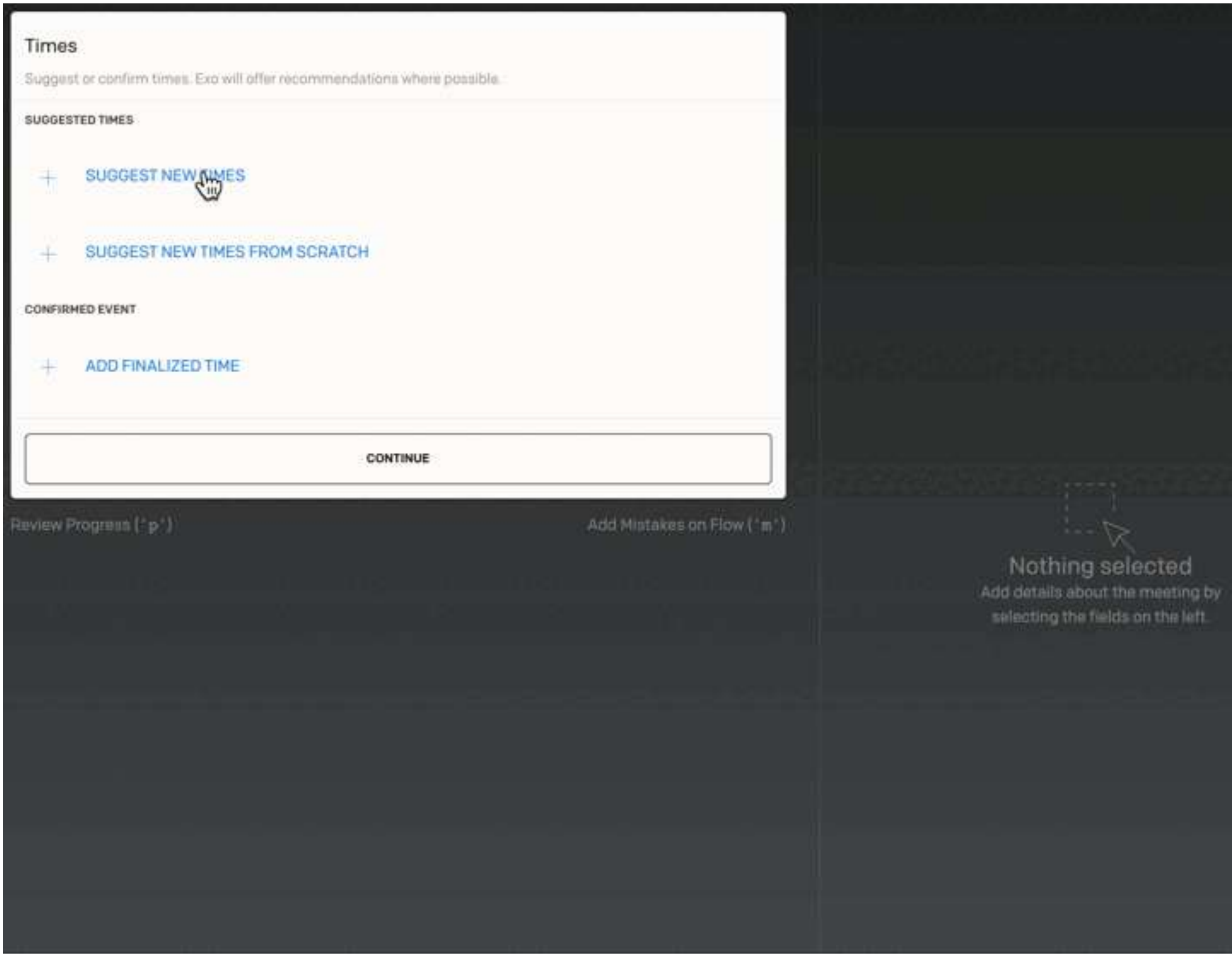
The Times Step (Pictured below) includes the following actions:



- **Suggest Times**
- **Add Finalized Time**
- **Remove Confirmed Time**
- **See Previously Suggested Times**

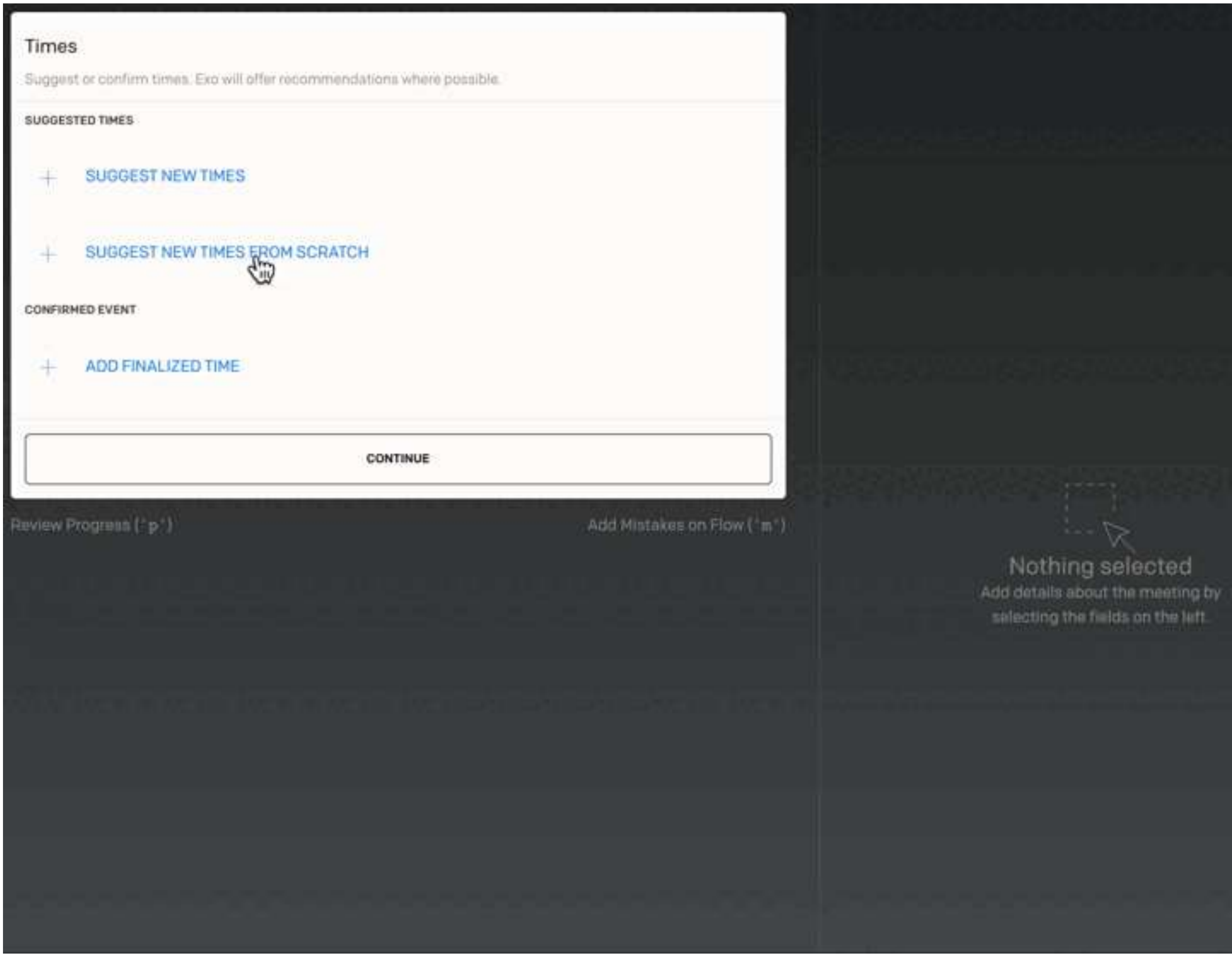
Over the next series of screenshots, we'll illustrate how to use the tools and buttons on the Times step.

Suggest New Times



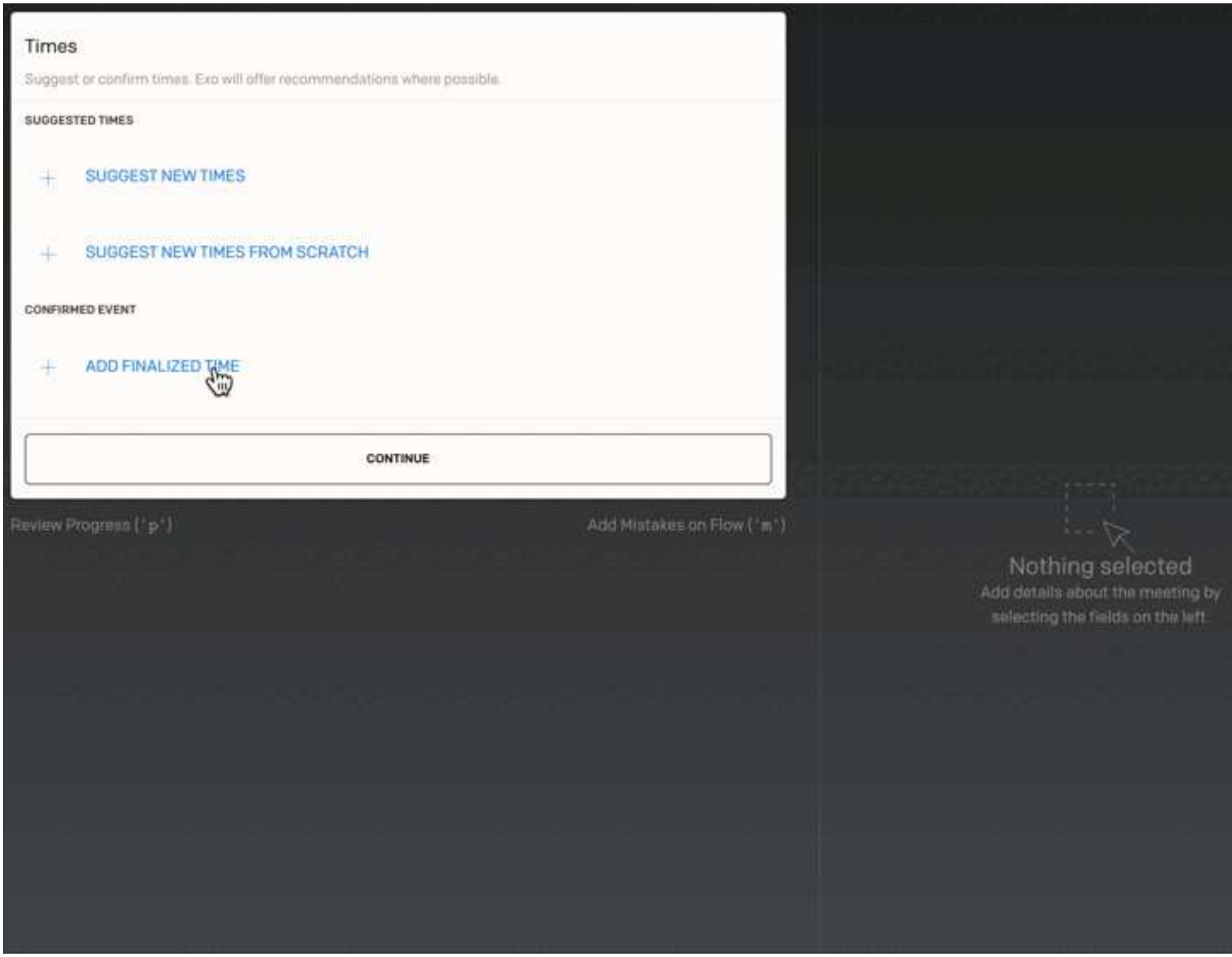
Suggest New Times: When selecting this option, Worker Bee will automatically choose up to 5 available times on the customer's calendar. If less than 5 times appear, open the full calendar view and manually select more times. Worker Bee will suggest only the next available times (even if the customer requested a specific time range), so this option is used when the customer isn't asking us to schedule for any specific time.

Suggest New Times From Scratch



Suggest New Times From Scratch: This option opens the full calendar view where you can manually select times on the customer's calendar. Use this option when a certain time range is requested, since Worker Bee will suggest only the next available times.

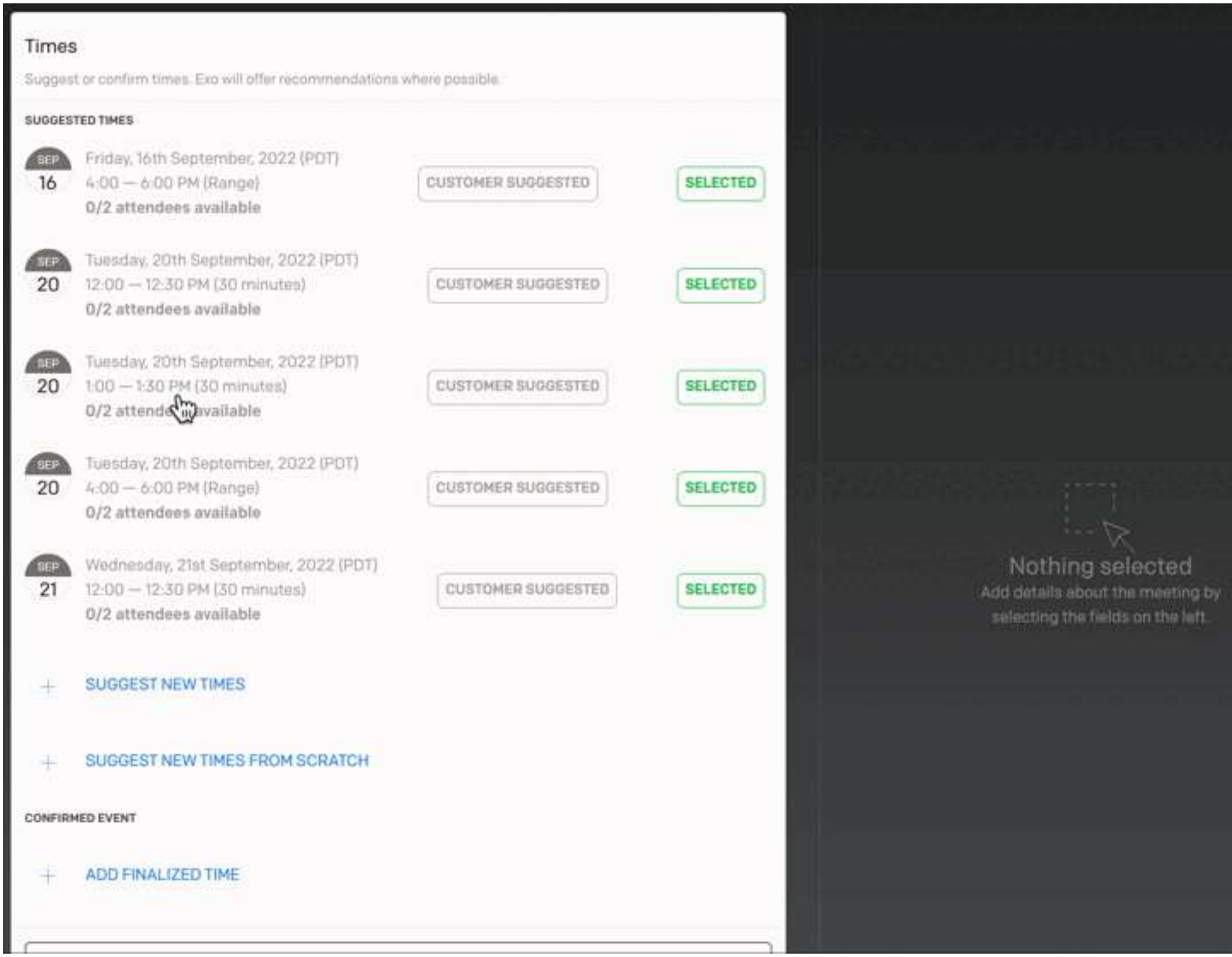
Add Finalized Time



Add Finalized Time: This option allows you to create a calendar invite for everyone once a time has been confirmed by all participants. Always make sure to confirm that the time is still available for the customer before finalizing the time, since this option will place the invite directly on the customer's calendar. You can either add a finalized time using the date and time selection tool or click on "Select Time On Calendar" to go to the full calendar view.

- **Note:** The date and time selection tool has a bug that changes the date to the day prior to the one you selected. Be sure that you're confirming the correct date before proceeding.

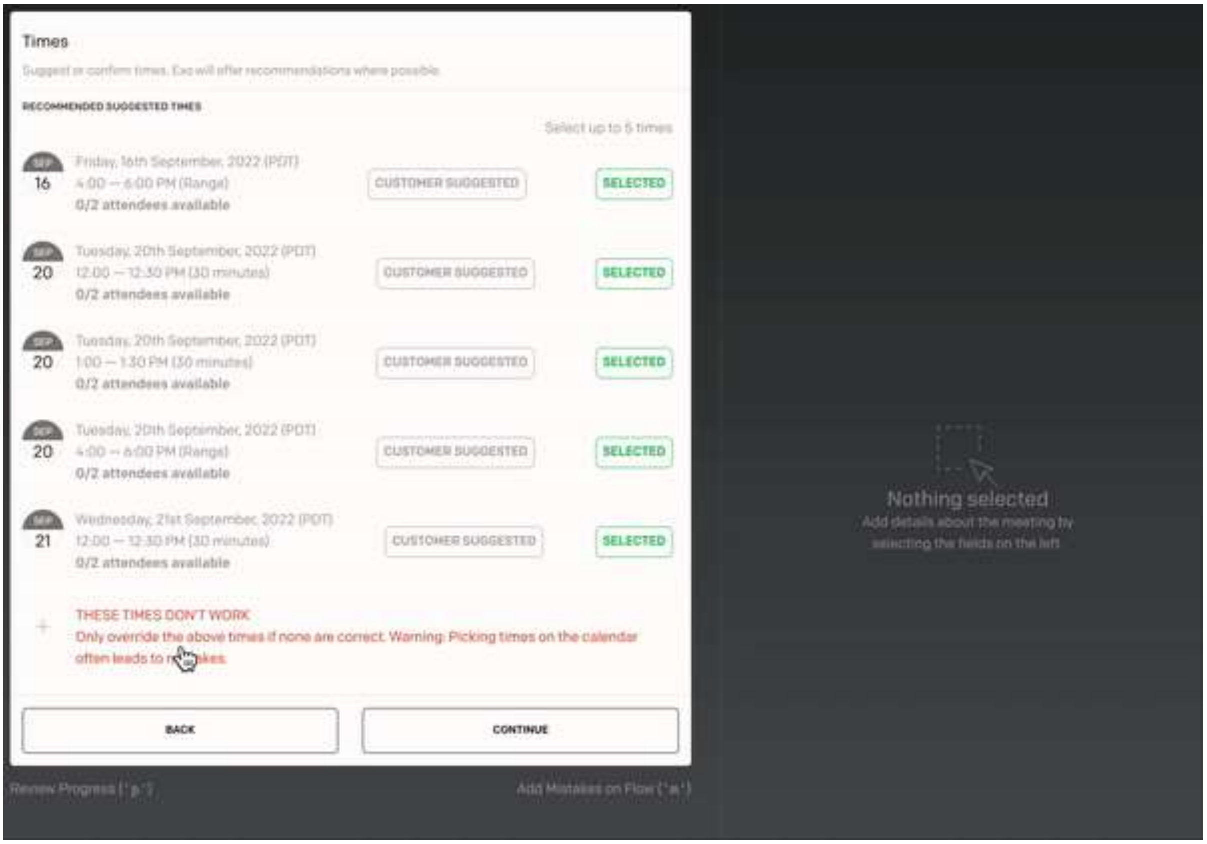
Review Previously Suggested Times



See Previously Suggested Times: When a job reopens (due to a snooze or a new email), the times selected by the previous CRA will be shown. It is your responsibility to confirm that the times are still available on the customer's calendar before moving past the Times Step.

- **Note:** If multiple customers are present in the job, always open the full calendar view and isolate their calendars to confirm that all suggested times are within each customer's PMTs.

These Times Don't Work

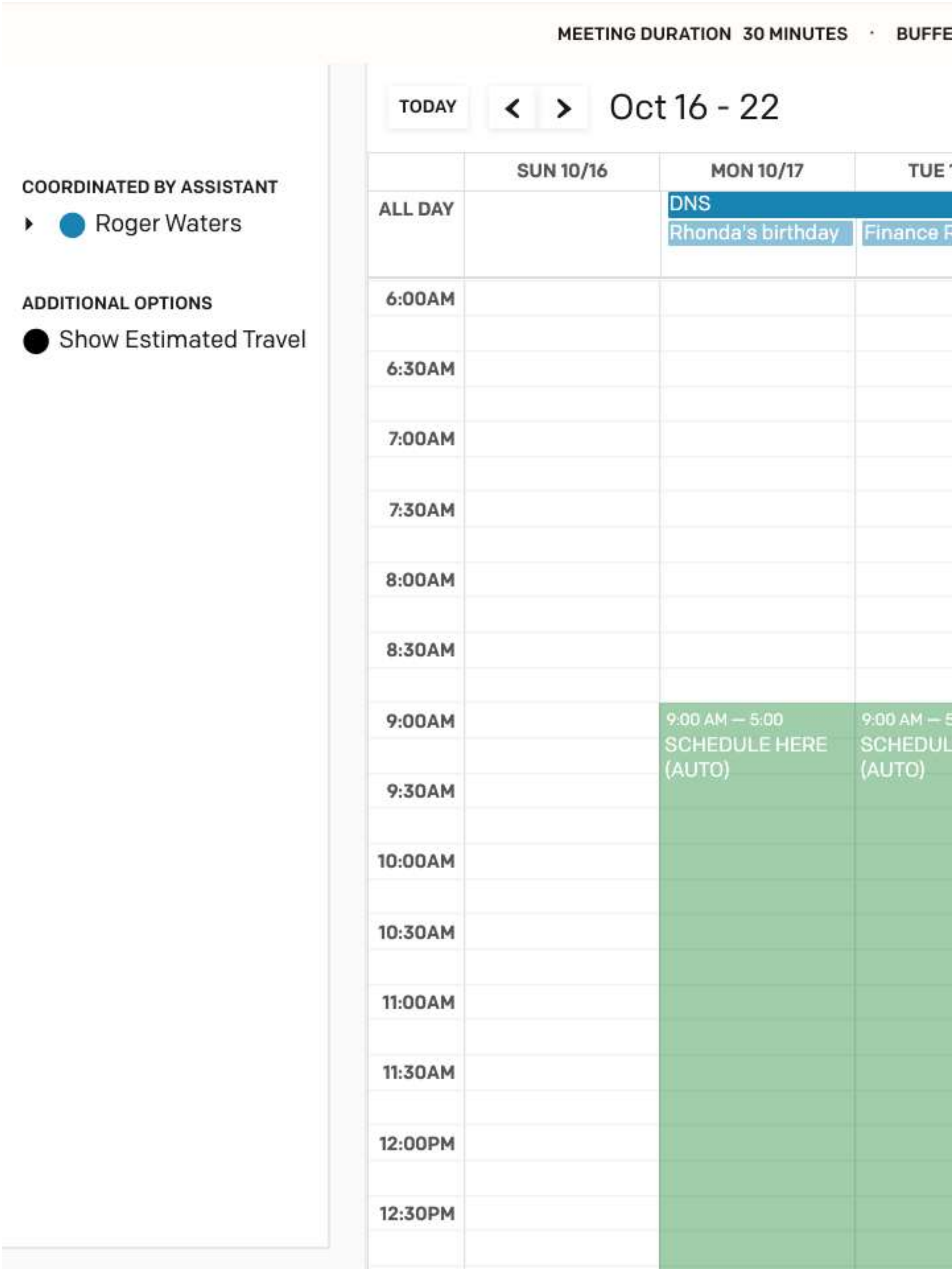


These Times Don’t Work: Select this option if Exo’s automatically-suggested times don't work. This opens the full calendar view where you can suggest other times manually, as necessary.

- **Note:** This will **NOT** remove the automatically-suggested times from the calendar. You’ll need to click on ‘Remove All Suggested Events’ on the full calendar view.

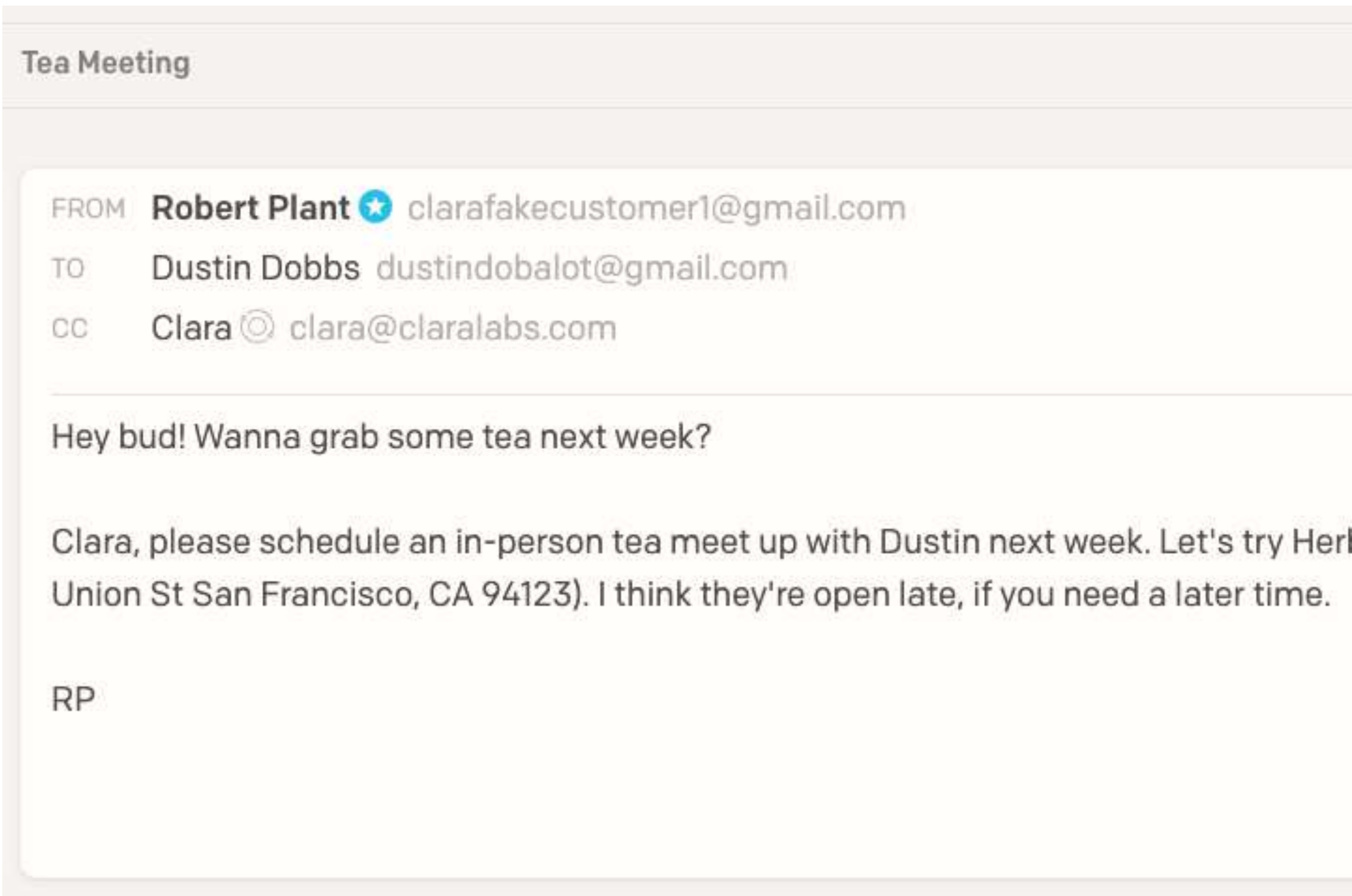
All-day events

All-day events (ADEs) are calendar blocks pertinent to an entire day. ADEs are shown at the topmost section of the calendar. In the following screenshot, "DNS" is an ADE.


MEETING DURATION 30 MINUTES · BUFFE
TODAY
Oct 16 - 22
COORDINATED BY ASSISTANT
Roger Waters
ADDITIONAL OPTIONS
Show Estimated Travel
SUN 10/16
MON 10/17
TUE 1
ALL DAY
DNS
Rhonda's birthday
Finance F
6:00AM
6:30AM
7:00AM
7:30AM
8:00AM
8:30AM
9:00AM
9:30AM
10:00AM
10:30AM
11:00AM
11:30AM
12:00PM
12:30PM
9:00 AM — 5:00
SCHEDULE HERE (AUTO)
9:00 AM — 5
SCHEDUL (AUTO)

ADEs that have a "DNS" (Do Not Schedule) or "Travel" label are the only ADEs that affect scheduling. Ignore all other ADEs.

- "DNS" or "Do Not Schedule": **Do not schedule anything for then unless the customer specifically states we can schedule over the event in context**. For example, the customer says "Please make this meeting for Monday (Oct 17) at 11am. Okay to schedule over anything". If they do not give permission to schedule over, we must confirm that we can do so before scheduling.
- "Travel: Location": The customer will be in the specified location. You may schedule in-person meetings so long as the meeting location is in that city. For example, Robert asked to have a meeting in San Francisco, but Robert's calendar indicates that they will be in New York. Virtual meetings may also be scheduled on Travel days.



Tea Meeting

FROM Robert Plant clarafakecustomer1@gmail.com
TO Dustin Dobbs dustindobalot@gmail.com
CC Clara clara@claralabs.com

Hey bud! Wanna grab some tea next week?

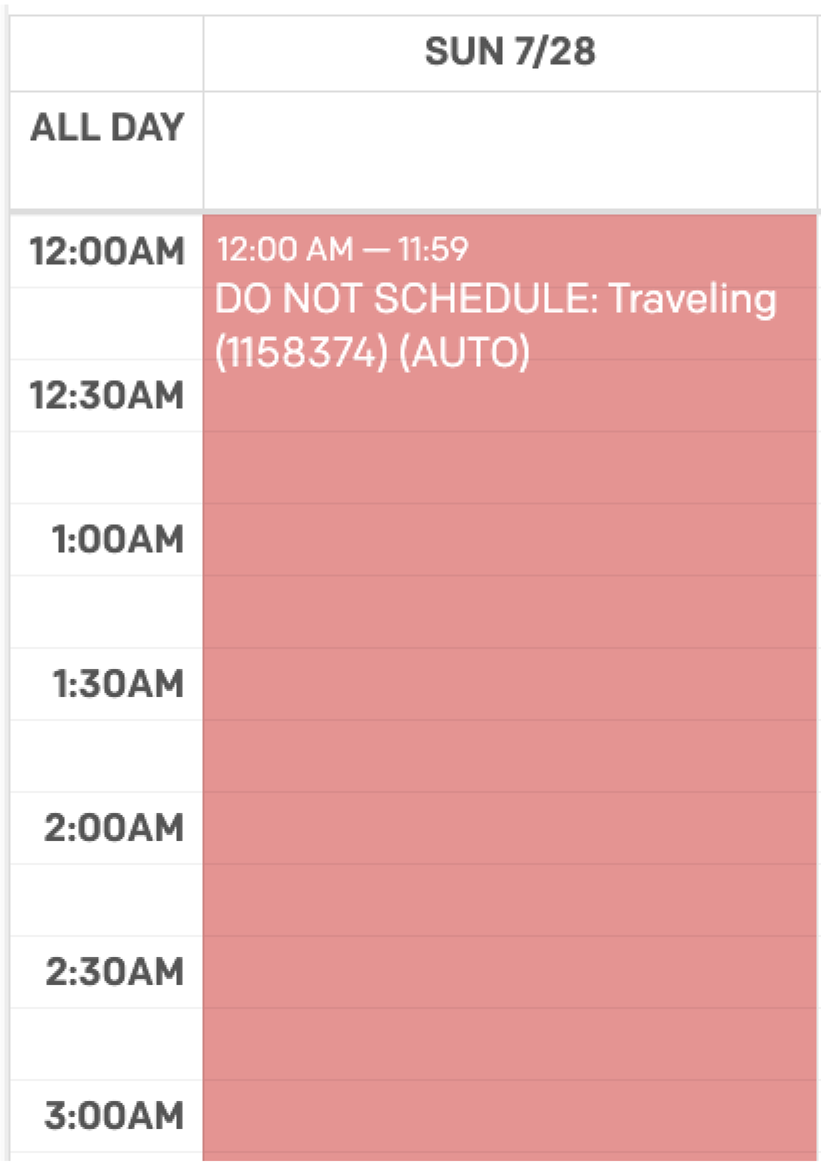
Clara, please schedule an in-person tea meet up with Dustin next week. Let's try Her
Union St San Francisco, CA 94123). I think they're open late, if you need a later time.

RP

All other ADEs with no label: Completely disregard that ADE. The ADE should be considered as a “reminder” for the customer only, and it does not impact any aspect of scheduling. Even all-day events such as “OOO” should be ignored.

Internal Blocks

Sometimes, customers will ask us to add internal blocks to their calendar. While they are not visible to the customer, they're extremely important in guiding us how we should schedule. If a customer mentions they are traveling or need to note their calendar, you can escalate that request to be completed, as shown below.

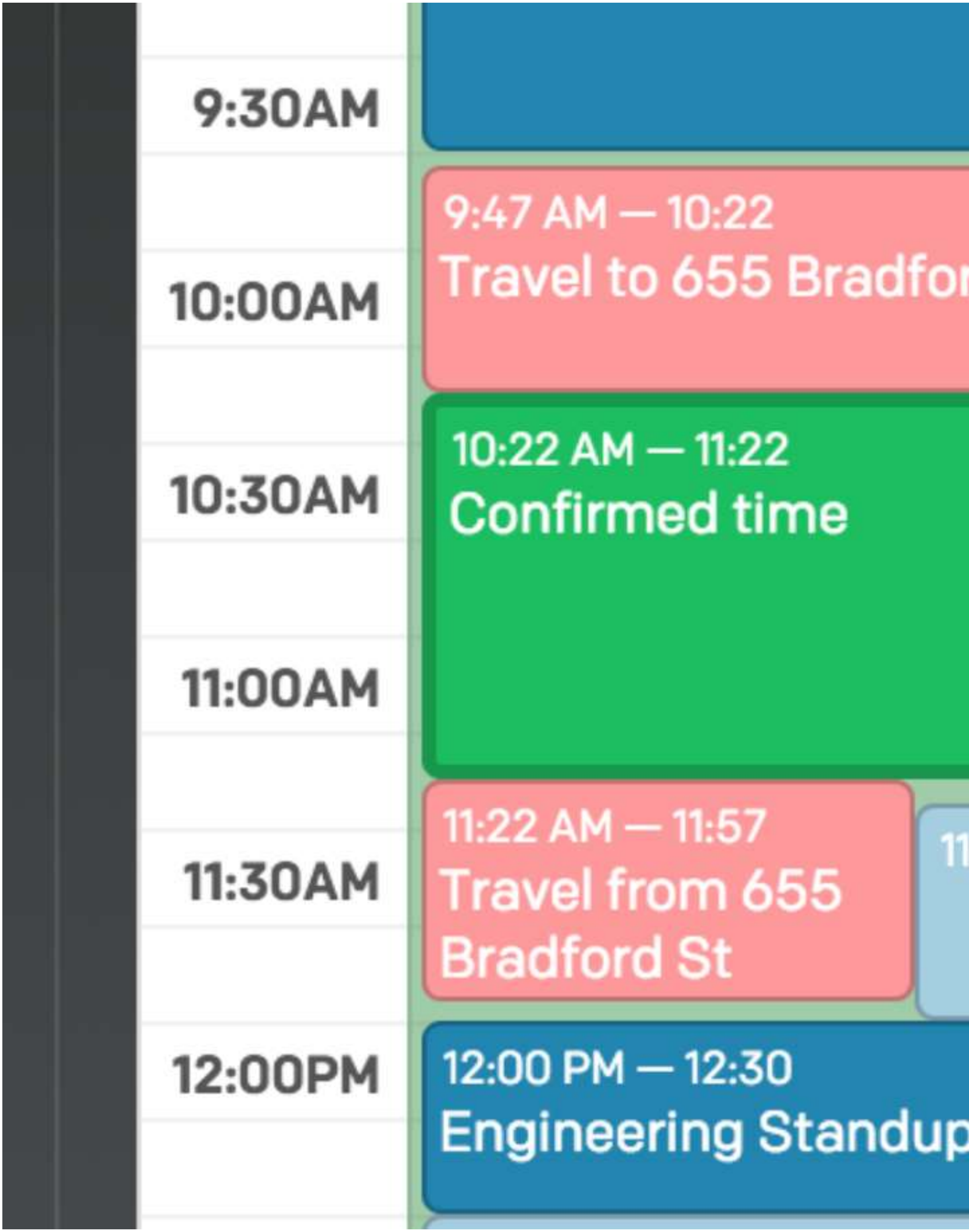


It is important to note that these events should be treated like any other event on the customer's calendar. Since they cannot see them, it's important to ask the customer if they would like us to schedule over them, as any regular conflict.

Travel Events + Travel Time

Travel time is how much time a customer may need to get from point A to point B.

Exo will automatically add and show travel-events with the appropriate time on the Exo calendar preview **after** a time has been confirmed. When manually suggesting times, please make sure there is a 30 minute buffer before and after your suggested time to account for travel.


9:30AM
10:00AM
10:30AM
11:00AM
11:30AM
12:00PM
9:47 AM — 10:22
Travel to 655 Bradfor
10:22 AM — 11:22
Confirmed time
11:22 AM — 11:57
Travel from 655
Bradford St
12:00 PM — 12:30
Engineering Standup

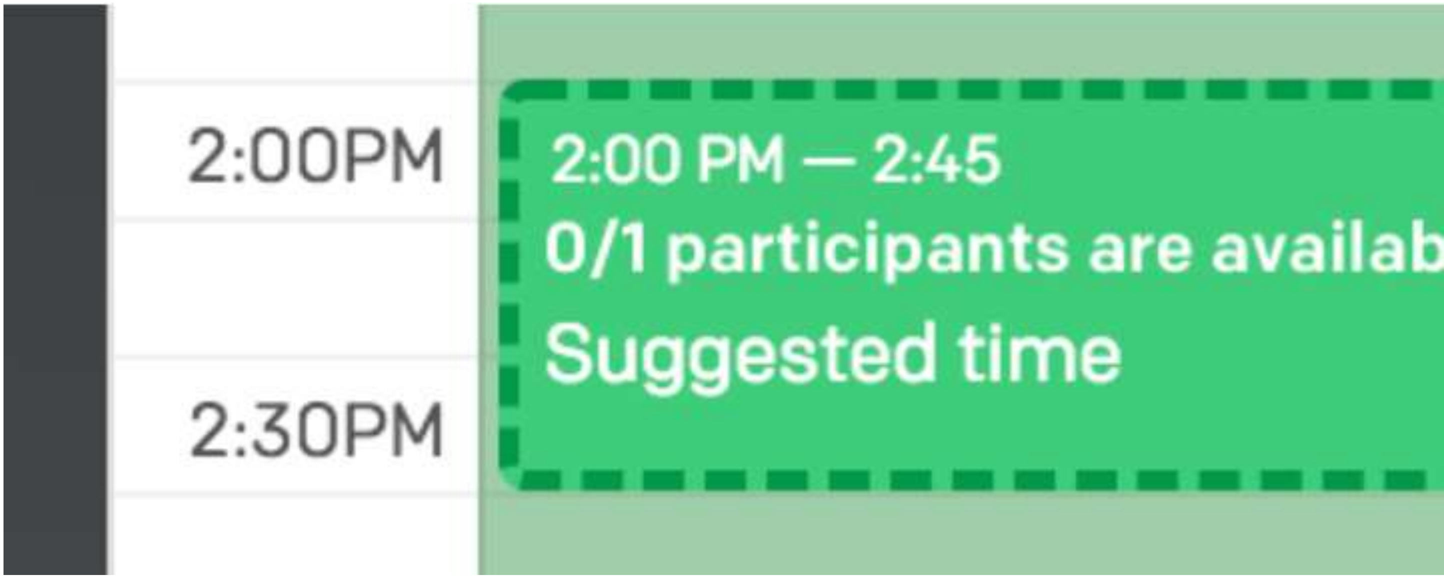
Example of travel events in pink on the calendar preview.

Notes:

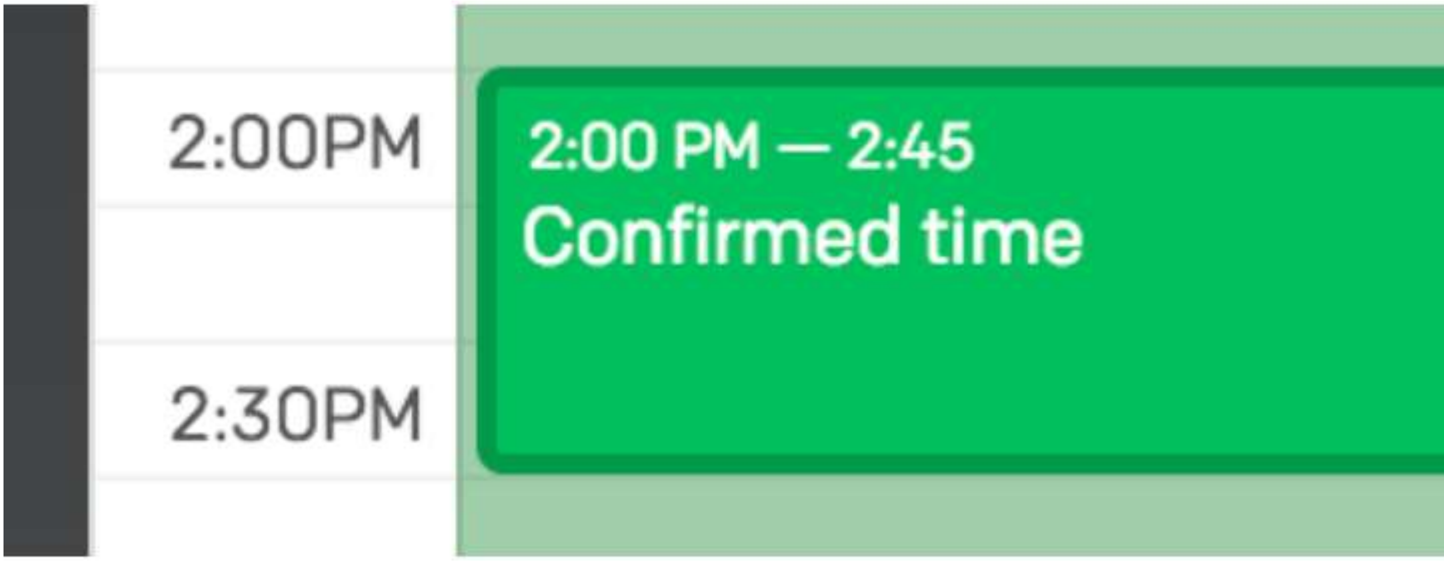
- We cannot set specific travel times ourselves. If a customer asks to block off a certain amount of travel time, loop in Support in the Composer Step.
- Travel time can count as buffer time. For example, if a Customer's preference is to have 30 minutes of buffer time between meetings, 30 minutes of travel to the next meeting would satisfy buffer time.
- Travel time must be accounted for in all in-person meetings. If a customer confirms a time that has conflicts within the 30 minute travel buffer, we must ask for permission before confirming the time. (We should not assume a customer is willing to take a virtual call while traveling or assume the location they will be in before or after the meeting. See: Composer Step)

How times appear on the calendar

Times selected by Worker Bee or yourself will appear on the calendar, as pictured below.



Suggested times will appear with a broken-line border.



Times that have previously been confirmed or will be sending an invite for on the current request will appear with a solid border.

Suggesting Times

Exo usually auto-populates times you can suggest to the participant. For each time selected, you must make sure that it's a good time for the customer and anyone whose calendar you can see.

Best Practice:

Always suggest times on the first email, unless a codeword indicates that the customer would like the participant to provide availability first.
For the purposes of scheduling, a good time is as follows:

☑ It doesn't fall within a "DNS" or "Do Not Schedule" day (unless customer has given permission)

☑ It doesn't conflict with a particular travel ADE if scheduling an in-person meeting

☑ It doesn't overlap with other calendar blocks (unless customer has given permission)

☑ It falls within the customer's preferred meeting times (PMTs). **This includes toggling the calendars if there are multiple customers included.**

☑ It falls within 8am-7pm in the participant's time zone (or the customer's time zone if we don't know) ((Please note: Any events must **end** by 7pm, not start at 7pm.))

☑ It honors the customer’s buffer preference, if they have any

☑ It allows for at least two hours of buffer time before and after flights

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The following is a list of commonly requested meetings and the times you should suggest for them.

Type of Meeting	What to suggest
Morning	8am-12pm
Afternoon	12pm-5pm
Evening	6pm-8pm
Breakfast	8am-10am
Lunch	12pm-2pm
Dinner/Drinks	6pm-9pm
Early next week	Monday, Tuesday
Late next week	Thursday, Friday
Next couple of days	next 2 business days
Next few days	next 3 business days
In the next few weeks/In the next week or so	within the next 2 weeks
Happy hour	4pm-8pm

If Clara is the coordinator for more than one customer, open the full calendar view. There, isolate each customer's PMTs to make sure the times suggested fall within everyone's PMTs. This must be checked every time you suggest times on the job.

Unless a customer suggests only one time, or unless you need to re-suggest the same time when scheduling with multiple participants, always suggest at least 5 times and/or time ranges.

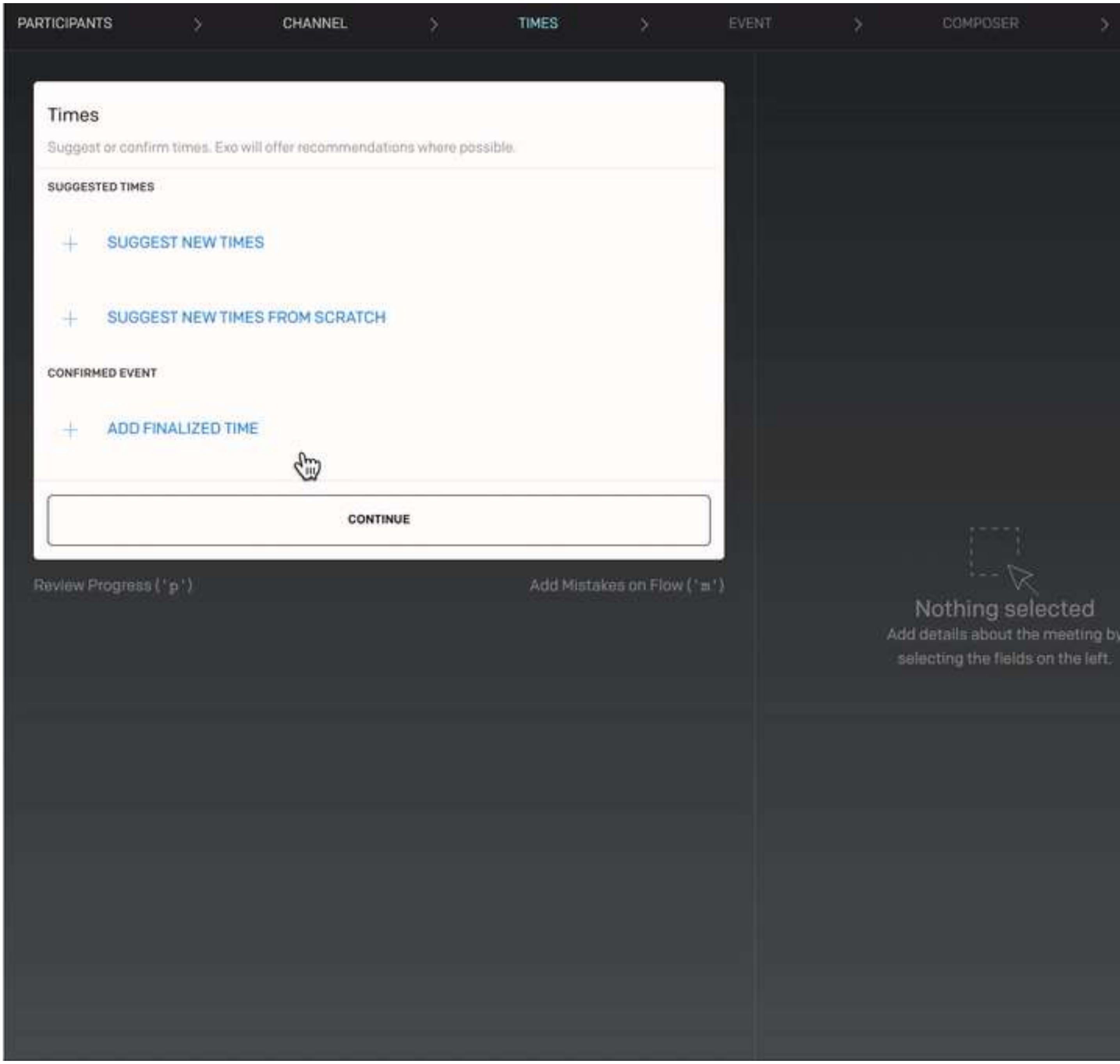
If Exo auto-suggests fewer than 5 times and/or time range, open the full calendar view and manually select additional available times. Start on the same week as the auto-suggested times and check the next few weeks, if needed. We want to schedule as soon as possible, unless a time range is requested.

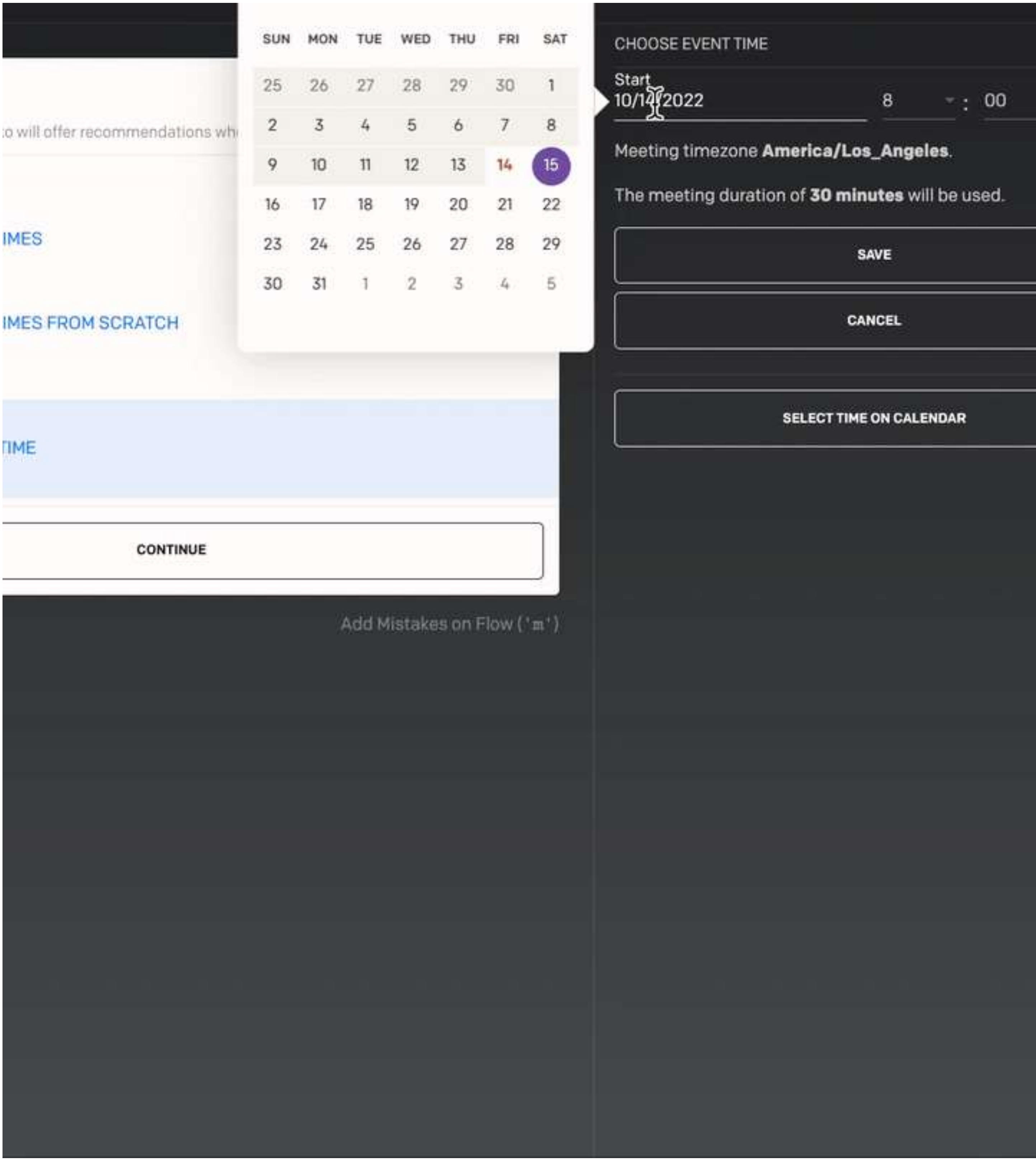
If you still can't find 5 good times within a few weeks—due to DNS blocks, busy calendar blocks, or travel blocks—, it's okay to suggest fewer than 5 times. But again, suggest as many as possible.

Add a Finalized Time to the Calendar

Once the participant confirms the time of a meeting, you should verify that the time still works on the customer's calendar. You will then send invites to all meeting participants added to the Participant step, with the "Confirm" template.

Select the "Add finalized time" button to open a direct edit view, which allows the choice of selecting the time on the calendar or typing in a time directly. (Both depicted below)


PARTICIPANTS
CHANNEL
TIMES
EVENT
COMPOSER
Times
Suggest or confirm times. Exo will offer recommendations where possible.
SUGGESTED TIMES
SUGGEST NEW TIMES
SUGGEST NEW TIMES FROM SCRATCH
CONFIRMED EVENT
ADD FINALIZED TIME
CONTINUE
Review Progress ('p')
Add Mistakes on Flow ('m')
Nothing selected
Add details about the meeting by
selecting the fields on the left.


SUN MON TUE WED THU FRI SAT
25 26 27 28 29 30 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
CHOOSE EVENT TIME
Start
10/14/2022
8
00
Meeting timezone America/Los_Angeles.
The meeting duration of 30 minutes will be used.
SAVE
CANCEL
SELECT TIME ON CALENDAR
o will offer recommendations wh
IMES
IMES FROM SCRATCH
TIME
CONTINUE
Add Mistakes on Flow ('m')

Reminder: The date and time selection tool has a bug that sometimes changes the date to the day prior to the one you selected. Be sure that you're confirming the correct date before proceeding.

Add an Event Directly to the Calendar

Customers sometimes ask Clara to add events to their calendar. Those events can be actual meetings (that everyone has already agreed upon), or just general reminders. You only need to add these events to the customer's calendar and, if necessary, include any CC'd participants.
If there is missing information, you might still be able to add the event to the customer's calendar.

However, if it is clear that the information is not showing in Exo, please escalate to Admin for the invite to be checked externally.

- Missing Duration: Use default duration
- Missing Location: Custom Channel: TBD and offer to add one in and archive (No snooze is necessary)
- Missing Time/Date: Using a Custom Reply template, ask the customer for these details

Please observe the following protocols when there is a conflict on the customer's calendar:

If the Invite will Include a Participant, but Conflicts with an Existing Calendar Block that's Not an Explicit Hold for That Meeting

1. If the "conflicting" calendar block is clearly a hold for the same event, go ahead and proceed as instructed.
2. If it is not, first confirm with the customer whether you may schedule over the existing block using the "Customer calendar conflict - with participants" template. Make sure to copy the name of the conflicting event, since the template requires it.

Note: Do not send an invite until we have permission. If Exo attempts to add it, make sure it is removed before proceeding through next steps.

If the Event to be Added to the Customer's Calendar Conflicts with an Existing Block and no Participant is Involved

1. Confirm the time on the Times step.
2. Use the "Customer calendar conflict - without participants" template to give the customer a heads-up about the conflict.

If the Event to be Added to the Customer's Calendar is Longer than 24 Hours

1. Loop in Support

Update Confirmed Event Time

Sometimes, depending on email context, a meeting can be rescheduled without first having to suggest new times. In other words, the originally confirmed time can be immediately updated to a new one.

1. Make sure that the new time works for the customer. If the new time is on the same date as the originally confirmed time, you may use the calendar preview. If the new time is on a different date, you must open the full calendar view.

TIME

OCT
07

Friday, 7th October, 2022 (PDT)
11:00 — 11:30 AM (30 minutes)

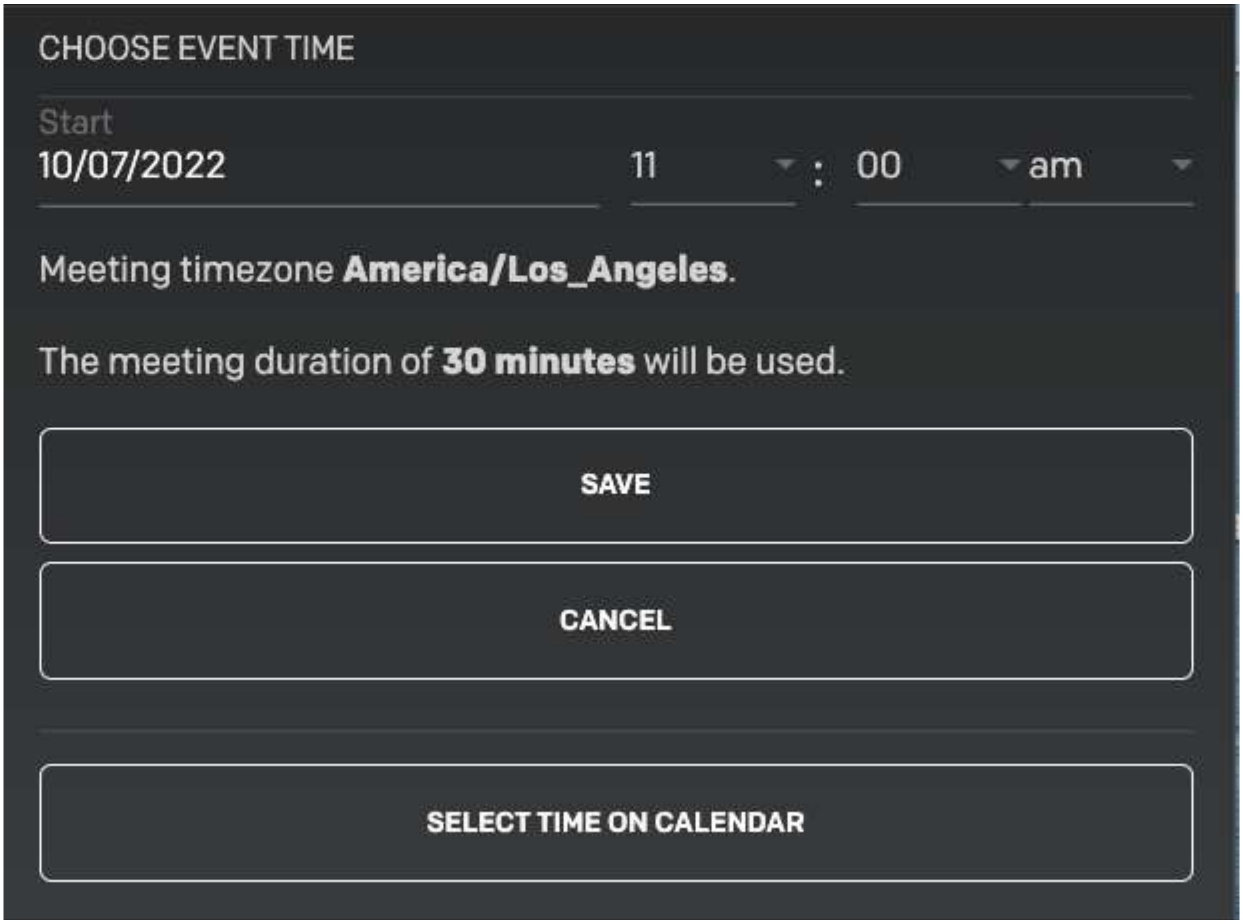
- MEETING DURATION 30 MINUTES
- BUFFER TIMES 15 MINUTES BEFORE AND AFTER

	FRI 10/07
ALL DAY	
10:00AM	
10:30AM	
11:00AM	11:00 AM — 11:30 Confirmed time
11:30AM	
12:00PM	
12:30PM	
1:00PM	
1:30PM	

OPEN CALENDAR

EDIT EVENT TIME

2. If the new time works for the customer, click on the existing invite and select "Edit event time."



3. You can use the direct edit view to update the time, or you can click "Select time on calendar." You will need to remove the existing invite before adding the new time if using the full calendar view.

Updating the Duration

To update the duration of a sent invite, proceed as follows:

1. Update duration in the Channel step.
2. Select "Edit event time" and make sure it shows the new duration in the following sentence:
   The meeting duration of x minutes will be used.
3. Select "Save."

4. On the Composer step, select the "Update event" template.

Times Scenarios

Suggest Edits

In Times Scenarios, we will walk you through the most common scenarios that you will see when processing in the Times Step.

Customer Suggested Times

- When Customers suggest or agree to a specific time (e.g., "8pm on Friday") or time range (e.g., "anytime between 6am and 7:30am next week") that is outside of their usual preferred meeting times (PMTs), and **if there are no calendar conflicts (To include "DNS" or Internal blocks)** or travel-time conflicts, you must immediately schedule **for then and only for then**. Do not double-check with the Customer to schedule outside of their PMTs when they have already suggested or agreed to one or more times outside of them. You must **always** ask to schedule over conflicts, unless the customer notes that the specific conflicting event can be ignored

- When a Customer suggests or agrees to a specific time range that covers times both with PMTs and without (e.g., "tomorrow" or "next month"), and if there are no calendar conflicts or travel-time conflicts, you must immediately try to schedule **for then and only for then, within PMTs.** If there are no available time slots within PMTs, ask the customer for permission to schedule outside of them

- When a Customer suggests a specific time frame that does **NOT** have PMTs, we can suggest times without asking the customer to schedule outside of their PMTs. (Note: Please try to suggest times that make sense with their other PMTs. For example, if a customer's normal PMTs are 10am to 4pm, try to suggest times within that time frame. Otherwise, keep the times within 8am to 7pm.)

- You may suggest different times only when the Customer's suggested time or time range doesn't work for the participant, or if the Customer's suggested time or time range has already passed.

Scenario of the Customer Suggested Time:	Calendar conflict?:	Utilize Customer's Buffer?:	Times Step Action:	To
Tuesday at 8am	No	No	Suggest that time and **only** that time	To P Strikeout/
Tuesday at 8am	Yes	No	None	To Custo Calenda pa To Particip Acknowle
Anytime between 6am and 7:30am next week	No	No	Suggest those times and **only** those times	To P Strikeout/
Anytime between 6am and 7:30am next week	Yes	No	None	To Custo Calenda pa To Particip Acknowle
Next month or week of Oct 3	No	Okay to ignore buffer if no other times are available	Suggest times in PMTs	To P Strikeout/
Next month or week of Oct 3	Yes	Okay to ignore buffer if no other times are available	No available times in PMTs - None	To Custom to To Particip Acknowle

If There Are No Conflicts

1. Offer the participant times according to the Customer's suggestion
2. If a particular time doesn't work for the participant, offer new times that still fall within the Customer's suggested time ranges (if any)
3. Suggest new times based on the Customer's usual PMTs **only** if you've exhausted all possible times or time ranges suggested by the Customer, or if the Customer's suggested times or time ranges have already passed

If There is a Buffer-Time Conflict

1. Proceed with the Customer's suggestion. Ignore usual buffer preferences for times or time ranges that Customers suggest. Be sure to select the "Customer Suggested" button as described below

If There is a Travel-Time Conflict

1. Follow these instructions. Send an invite to the participant **only** if the Customer grants permission to override these conflicts

Caution:

If Exo attempts to send a calendar invite and you have not yet been given permission, be sure to delete it before proceeding through the next steps.

If There is a Conflict That's Not an Explicit Hold for the Time Requested

We must **always** ask to schedule over any conflicting event, unless the conflicting event is a clear hold for our invite or the customer specifically names the conflict in their request.

1. Send the Customer the "Customer calendar conflict - with participants" template. Make sure to include the name of the conflicting event with the title of the event in parenthesis (e.g. "All-Hands Meeting" or for an internal block "DNS"). Snooze this email. Send an invite to the participant **only** if the Customer grants permission to override these conflicts

If Exo attempts to send a calendar invite, be sure to delete it before proceeding through the next steps.

However, if the “conflicting” event **is** an explicit hold for the event in question, ignore the calendar block, confirm the time, and send the Confirm template. You don't need to ask to schedule over a conflict if it's a hold for that specific meeting.

The Customer Suggests Multiple Times and One or More of the Times Have Conflicts (Not all)

We must **always** ask to schedule over any conflicting event, unless the conflicting event is a clear hold for our invite or the customer specifically names the conflict in their request.

1. In the Times Step, select all of the times that the customer suggested and note the name(s) of the conflicting event(s).
2. Send the Customer the "Customer calendar conflict - with participants" template. Make sure to include the name of the conflicting event(s) with the title of the event in parenthesis (e.g. "All-Hands Meeting" or for an internal block "DNS"). Adjust the verbiage to let the customer know there is a conflict at one of their suggested times and set a snooze to follow up:

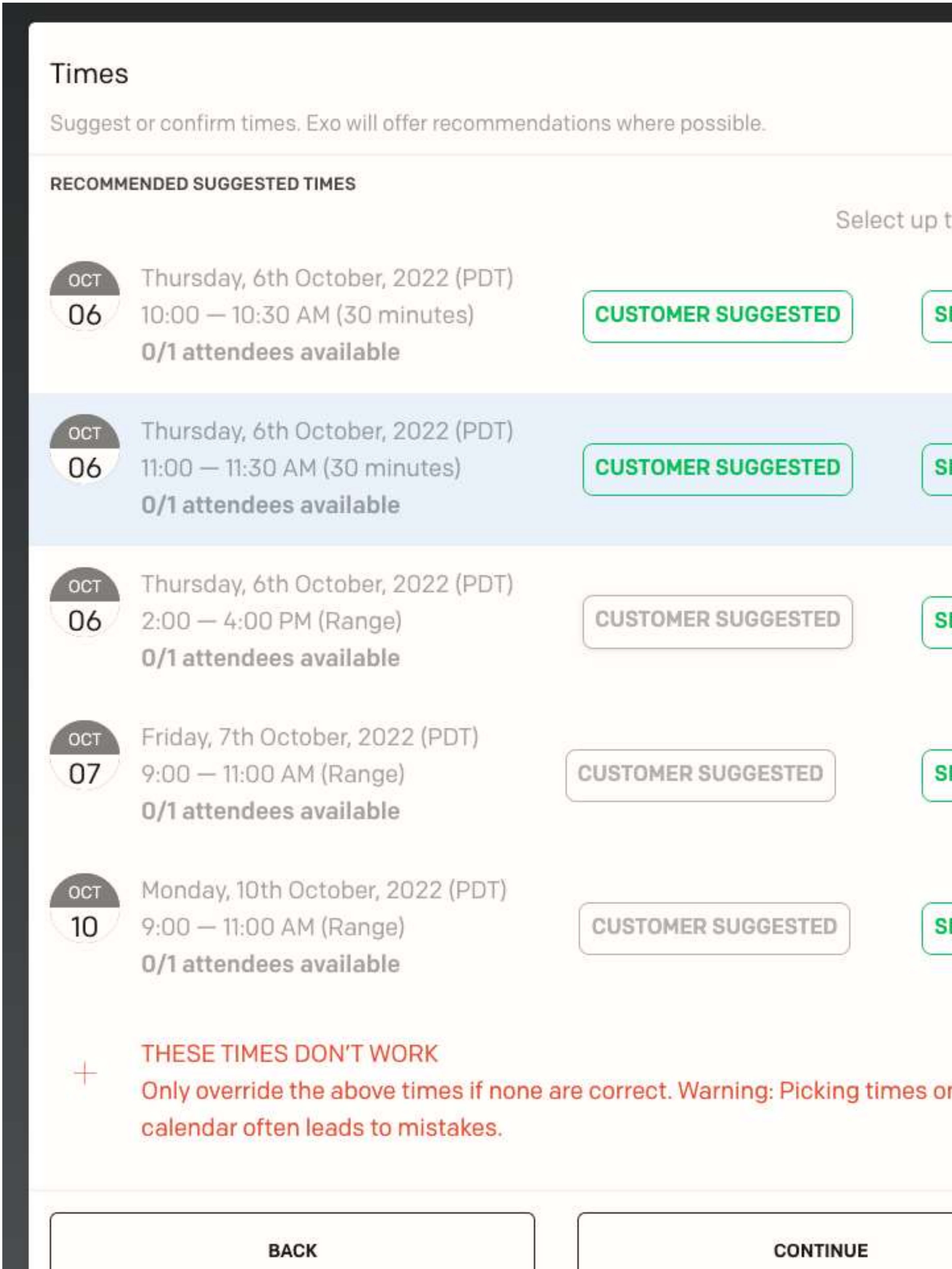
"*One of the times you suggested conflicts with "{{Name the conflict}}". Should I schedule over the conflicting event, or suggest different times to {{Participants}}? I've suggested the other times for now.*"

1. Send the participant the Suggest Times email with the times that do work.

Customer Suggested Times Button

Click on the "Customer Suggested Times" button if the time or time range suggested matches the time or falls within the time range that the customer suggested or agreed to.

You only need to use this button if the customer has a buffer preference and is requesting a specific range of time. If the customer has no buffer preference and isn’t requesting any specific times, do not use this.


Times
Suggest or confirm times. Exo will offer recommendations where possible.
RECOMMENDED SUGGESTED TIMES
Select up t
OCT 06
Thursday, 6th October, 2022 (PDT)
10:00 — 10:30 AM (30 minutes)
0/1 attendees available
CUSTOMER SUGGESTED
OCT 06
Thursday, 6th October, 2022 (PDT)
11:00 — 11:30 AM (30 minutes)
0/1 attendees available
CUSTOMER SUGGESTED
OCT 06
Thursday, 6th October, 2022 (PDT)
2:00 — 4:00 PM (Range)
0/1 attendees available
CUSTOMER SUGGESTED
OCT 07
Friday, 7th October, 2022 (PDT)
9:00 — 11:00 AM (Range)
0/1 attendees available
CUSTOMER SUGGESTED
OCT 10
Monday, 10th October, 2022 (PDT)
9:00 — 11:00 AM (Range)
0/1 attendees available
CUSTOMER SUGGESTED
THESE TIMES DON'T WORK
Only override the above times if none are correct. Warning: Picking times or
calendar often leads to mistakes.
BACK
CONTINUE

🚧

How Strikeout Templates relate to the Times Step:

There are certain conditions that need to be met on the Times Step for the Strikeout templates to work correctly when sent to the participant. If these needs are met, the Strikeout template can be used in the Composer Step.

1. All times suggested are within the customer's PMTs. Strikeout templates will show that the time is unavailable if any time is suggested outside of PMTs, even if the customer has agreed.

2. All times suggested have no conflicts. All times suggested must be free of conflicts (whether the customer agreed or not). Otherwise, the times will show as unavailable.

3. All times suggested honor the customer's buffer preference. If you are prompted to suggest a time that conflicts with the customer's buffer preference, please use the "Customer Suggested" button before proceeding to the Event Step. This will allow the time to show properly on the Strikeout template. However, if the button has not been selected, the time will show as unavailable to the participant.

This is covered more in depth in the [Composer Step](#).

When to Ask The Customer

Be reasonable when suggesting times. If it's impossible to offer times within the customer's preferred meeting times (PMTs) and starts no earlier than 8am and ends no later than 7pm in the participant's time zone, use the "Ask to ignore preferred times, conflict, or buffer preference" template to ask the customer for permission.

If the customer does not have a buffer preference or we don't need to ask about a conflict, be sure you are removing that from the template.

You **may** suggest outside of 8am and 7pm **only** when context explicitly shows you may do so or if a customer responds and says they do not want to schedule outside of their PMTs and the only availability is outside of 8am-7pm.

Participant Suggested Time or Time Range

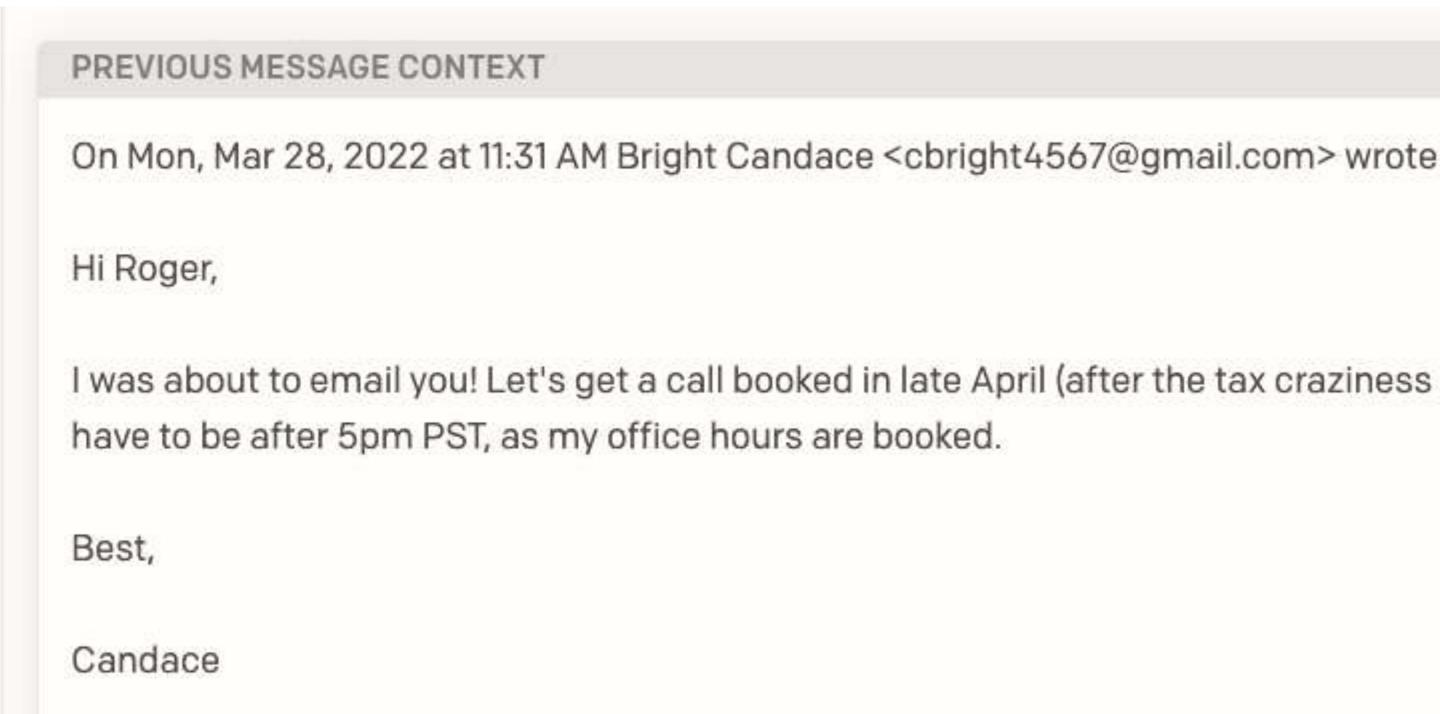
There are a few guidelines to follow when a participant suggests a time or time range. We want to try to accommodate their request as much as possible.

1. If a participant proposes a time that is available within customer preferences and availability, that time can be finalized (If they are the only participant).

2. If a participant proposes a time range ("Can you suggest some times for next Tuesday or Thursday"), suggest times **within** that window, if possible, and select the most appropriate dropdown menu option on the [Suggest More Times]() template in the Composer Step. If there are not five available times to suggest, it's okay to suggest less.

3. If a participant proposes a bad time or a time that no longer works for the customer due to preferences and availability, proceed to suggest new times. Choose the "Suggest More Times" or "Reschedule" template, depending on context. If "Reschedule", make sure to tweak the template to respond to their request.

Scenario 1: A participant provides their availability in the previous message context.



PREVIOUS MESSAGE CONTEXT

On Mon, Mar 28, 2022 at 11:31 AM Bright Candace <cbright4567@gmail.com> wrote

Hi Roger,

I was about to email you! Let's get a call booked in late April (after the tax craziness
have to be after 5pm PST, as my office hours are booked.

Best,

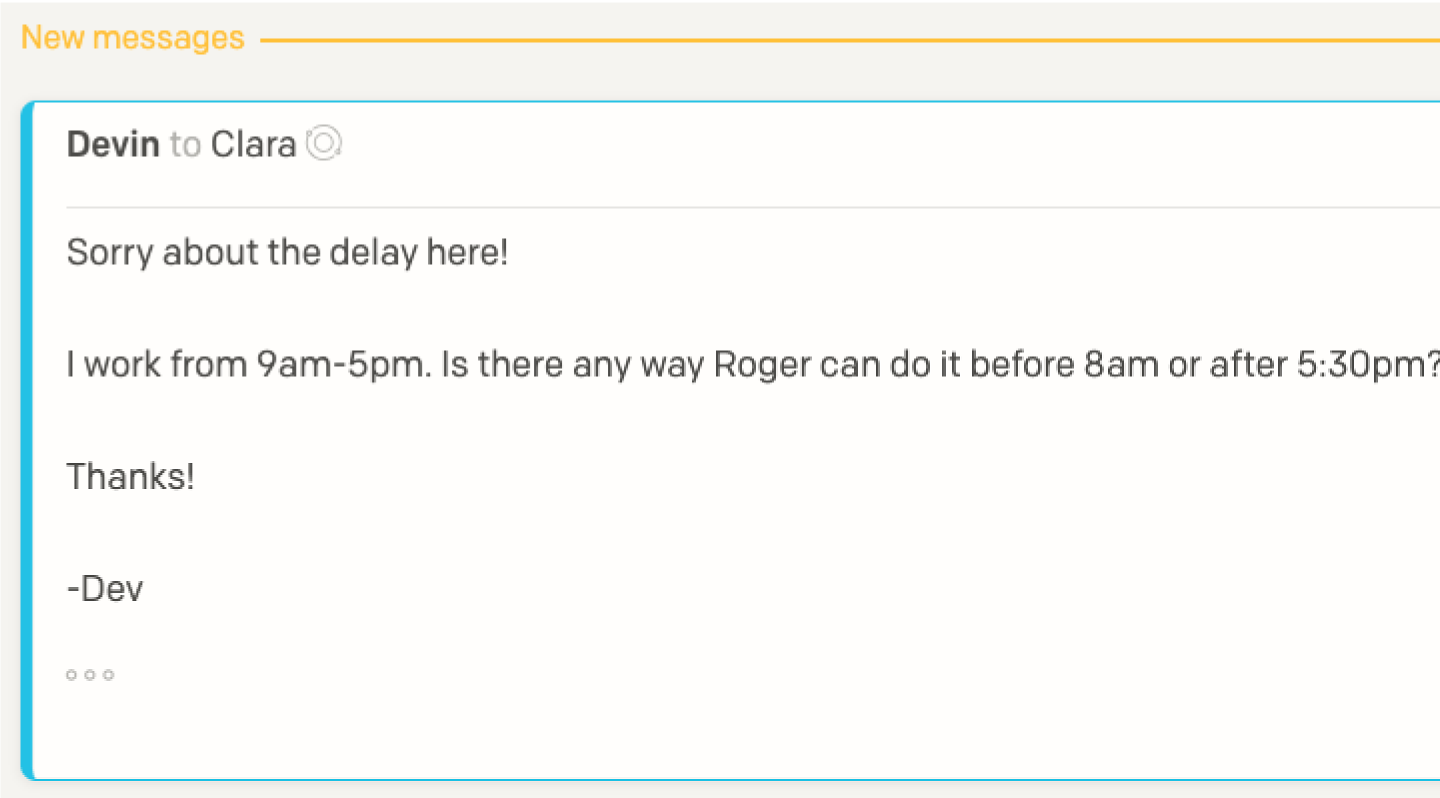
Candace

1. In the Times Step, confirm that the participant-suggested times work for the customer. If one time does, you may confirm the time and send an invite in the Composer Step.

2. If the participant suggested times that **do not** work for the customer, suggest times that do. In the Composer Step, please add in verbiage on the Strikeout/Regular Suggest Times template to acknowledge to the participant that

we saw their suggestion, but it doesn’t work for the customer: “Unfortunately, that time/those time(s) don’t work.”

Scenario 2: The participant indicates that they can meet only during a specific time or time range that is not available on the customer’s calendar.



1. Ask whether you can try accommodating the participant's availability using the "Ask to ignore preferred times, conflict, or buffer preference" template. Tweak the template to be as specific as possible.

For example, if the participant can meet only after 5:30pm because of work but the customer's PMTs end by 4pm, ask the customer for permission to schedule outside of PMTs.

If the participant's only availabilities are in the morning, but the customer is fully booked every morning, ask for permission to schedule over specific events.

If the participant must meet the customer before a specific date, ask the customer for permission to schedule outside of preferences, without buffers, or over certain events to accommodate the short timeline.

If Participant Asks to Reschedule Before the Day the Event is Supposed to Occur

1. If times within the customer or participant's suggested time range can still be offered, offer them.
2. If not, offer new times.

If You Cannot See the Customer's or Participant's Suggestions

If the participant or customer's email suggests that they have suggested a time, but the suggested time is not visible in Exo, please check the following:

- Make sure to check the time isn’t in the subject line of the email or in the previous message context.
- Expand the email thread using the ellipses at the bottom right corner.

If the times are still not visible, please escalate.

When a Customer Requests Clara to Send Times We Would Like to Suggest to the Participant

Sometimes, we need to ask the customer to schedule outside of their PMTs and they request for us to send them the times we would like to suggest. In this instance, we should select available times and send them in the customer’s time zone.

The easiest way to do so is to select 5 times on the customer's calendar and proceed to the Composer step to edit the "Suggest More Times" template.

Please note: If there are time zone changes, make sure that time are as reasonable as possible for everyone.

For example, Candace, the participant, is only available Mondays after 6pm EDT, due to a time difference. Customer Frank’s PMTs end at 4pm EDT. Frank requests for us to send the times that we would like to suggest to Candace. Here, it would be reasonable to offer 6pm EDT and 6:30pm EDT.

Other Times Step Guidelines

Scheduling with Multiple Participants

When a job involves *more than one* participant, we need to respond to all emails in the thread (e.g. one participant confirming their availability) to advance the conversation forward. Use the "Multiple participants one confirming a time" and fill in accordingly. You will need to click on each of the times the participant(s) confirmed to be sure they still work for the customer before re-suggesting to the additional participants.

This process should continue until all participants have confirmed their availability.

Scheduling with a Colleague

When a colleague is added as a participant, you'll notice that their events will appear in a different color on the calendar view and that they don't have PMTs. If they're the only participant, you may confirm a time within the customer's PMTs between 8am and 7pm. If there is no mutual availability or a conflict during a time that was suggested, you can ask the colleague if we may schedule over any conflicts.

If there are other participants that you don't have calendar access to, suggest times within the customer's PMTs between 8am and 7pm in the participant's time zone. The only PMTs that you need to account for are the customer's.

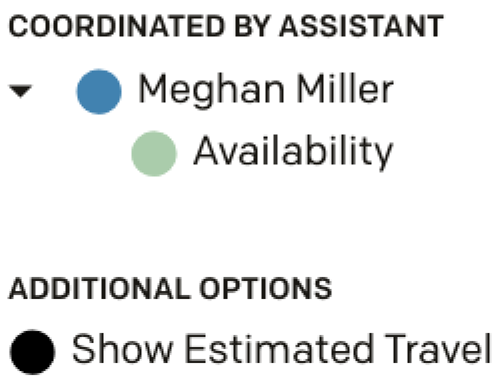
No Calendar Connected

A customer can add multiple calendars to their account and a colleague can share the calendar that matches the domain they share with the customer. These are below their name on the left side of the full calendar view. Exo will automatically assign Clara as a coordinator if they have previously chosen to share their calendar. However, it does not mean that it is still connected. We should be confirming that we have access to any calendars before moving forward with scheduling, as this effects who we need to ask for their availability.

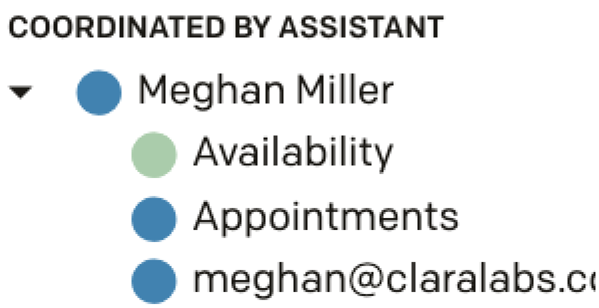
1. In the Times Step, open the full calendar view. If you do not see any events with the designated colors on the calendar, follow on to the next step.

2. Click the carrot next to their name on the left panel. This will reveal the calendars they have attached to their account. There should be at least one colored bubble below "Availability".

No calendars connected (shown below)



Calendars connected (shown below)



If no calendars are attached:

1. For an active customer, please loop them in to Support
2. For an inactive customer, go back to the Participants Step and remove Clara as their coordinator. They should be treated as a regular participant and we should confirm their availability.
3. For a colleague, please go back to the Participants Step and remove Clara as their coordinator. They should be treated as a regular participant and we should confirm their availability.

Note: Going back to the Participants Step will remove any edits you previously made. If you do not feel comfortable doing so, you can escalate to Admin and we will make the update.

If Clara has Access to All Calendars

If all participants are either customers or participants and we can see all of their calendars in the Times Step:

1. See Participant Step

Clara-to-Clara Scheduling

Clara-to-Clara scheduling occurs when Customer A's Clara assistant coordinates with Customer B's Clara assistant. The only occasion we still use Clara-to-Clara scheduling is if both customers loop in their respective Clara's. Under most circumstances, we can directly confirm a time for both customers if only one Clara has been looped in.

One unique consideration about Clara-to-Clara scheduling is that the first Clara to reach out should be the one who sends the calendar invite.

Process:

1. Clara A (first to reach out): Suggest times as usual to Clara B.
2. Clara B: If a time works, create a custom response to let Clara A know (Tuesday (Mar 11) works for (Customer's name)); otherwise, suggest different times, but do not offer to send the calendar invite.
3. Clara A: When a time is finalized, send the calendar invite.
4. Clara B: Verify that the invite is on Customer B's calendar using the "Acknowledge participant invite" template.

Participant Sends or Offers to Send an Invite

Ideally, we should send all calendar invites for meetings that we schedule, but sometimes participants want to send the invite instead.

What if the Invite Doesn't Match the Customer's Preferences?

If the invite is present in the thread, give the customer a heads-up, letting them know what preference in the participant’s invite was not followed (e.g., duration, who calls who, etc.). Please also update Exo to reflect any changes in participants, channel/duration, and title/description if we need to reschedule in the future.

If the details are visible only on the calendar, you do not need to update Exo or notify the customer of the changes.

Customer asks Participant to Send an Invite

When customers ask participants to send the calendar invite, you are still responsible for scheduling and ensuring that the invite is on the customer's calendar once confirmed.

- Once a calendar invite is received, ensure it's reflected on the customer's calendar.
- Ensure that the invite falls within the customer's preferences and that there are no conflicts. If there is conflict during the time the participant sent an invite for, suggest some new times and let the participant know that time no longer works.
- Ensure that the invite details are correct and fit the expectations established on the request.
- Update Exo with the details that are different from the customer’s defaults (duration, channel, title) if the details are visible in the email thread
- Use the "Acknowledge participant invite" template to tell the participant that the invite is on the customer's calendar.

If a participant offers to send an invite, but it has not yet been received

1. If able to confirm the time, proceed with sending the invite and use the "Participant offers to send invite" dropdown on the "Confirm" template.

If a participant offers to send an invite and it *does not* appear in the thread, but is on the customer's calendar

1. If able to find the participant's invite on the customer's calendar, proceed to the Composer Step. Do **NOT** go back to the Channel Step to update Exo with the details

from the customer's calendar. Exo should only be updated with participant invite information if it is present in the thread.

2. Use the "Acknowledge participant invite" template to tell the participant that the invite is on the customer's calendar.

Note: We do not need to let the customer know about the changes (duration or different channel), as the invite does not appear in the thread.

If a participant sends an invite before we can and *it appears in the thread*

1. Follow the same protocol outlined for ["Customer asks Participant to Send an Invite"].

If a participant sends an invite that doesn't work for the customer (Changed duration spans outside of customer's PMTs, conflicts, etc)

1. Suggest new times.

2. Edit the “Suggest New Times” template to say “Unfortunately, that time no longer works. If you could kindly remove your invite, it would be greatly appreciated.”

If a participant sends an invite, but the customer's calendar shows only "Busy" blocks

1. If the time a participant said they sent an invite for appears on the customer's calendar only as a "Busy" block, let the customer know using the "Notify customer cannot see participant invite because busy" template.

If a participant sends an invite and *it appears in the thread*, but it doesn't appear on the customer's calendar

1. Check for an event time:

    i. If the event time **does not** appear in the thread or the subject line, you can escalate to Admin to help find the event.

    ii. If the event time **does** appear in the thread or the subject line, check that the customer's email address is CC'd on the invite.

        a. If the customer's email address is CC'd, but does not appear on the calendar, please escalate to Admin.

    b. If the customer's email address is not CC'd, follow on to step 2.

2. Send the invite yourself.

3. Let the participant know using the dropdown menu option on the Confirm template for "Haven't received participant invite" template. Ask the participant to add the customer to the calendar and provide their email address. You can add, "If you could kindly add ((customer's email address)) to the invite, I'd be happy to remove my hold."

4. If the job reopens and the Participant's invite is *now* showing on the customer's calendar:

   a. Remove the invite from the calendar, if the new invite has no other conflicts.

   b. In the Composer Step, send the "Participant Sent Invite" and add "I have removed my invite to avoid confusion."

   c. If there are any different parameters (e.g., attendees, channel, duration, etc.), update Exo and let the customer know with the appropriate template.

Rescheduling a Participant Sent Invite

If the participant sent the invite and the event needs to be rescheduled, click here.

Participant Updated Invites

As much as possible, update Exo so it reflects all customer- or participant-initiated updates (e.g., duration, location, etc.), as long as the invite appears in the email thread. These updates will assist us in rescheduling, if necessary, in the future.

- If the time was updated to a new time previously agreed upon, acknowledge that you can see the change.

- If the time was updated by the participant to a new time that doesn't work for the customer, say it doesn't work and suggest new times, and ask them to kindly remove their invite, as per the verbiage here.

Missing Meeting Details

When a time has just been confirmed but essential details (e.g., phone number, location/address) are not yet available:

1. Send invites for the call or meeting. Exo autofills event details with "TBD" (To Be Determined), unless you use a Custom channel, where you will fill in "TBD" yourself.

2. If the missing details need to come from someone other than the participant, use the "Waiting on TBD details from outside party" dropdown on the “Confirm” template. See here for more detail on missing channel.

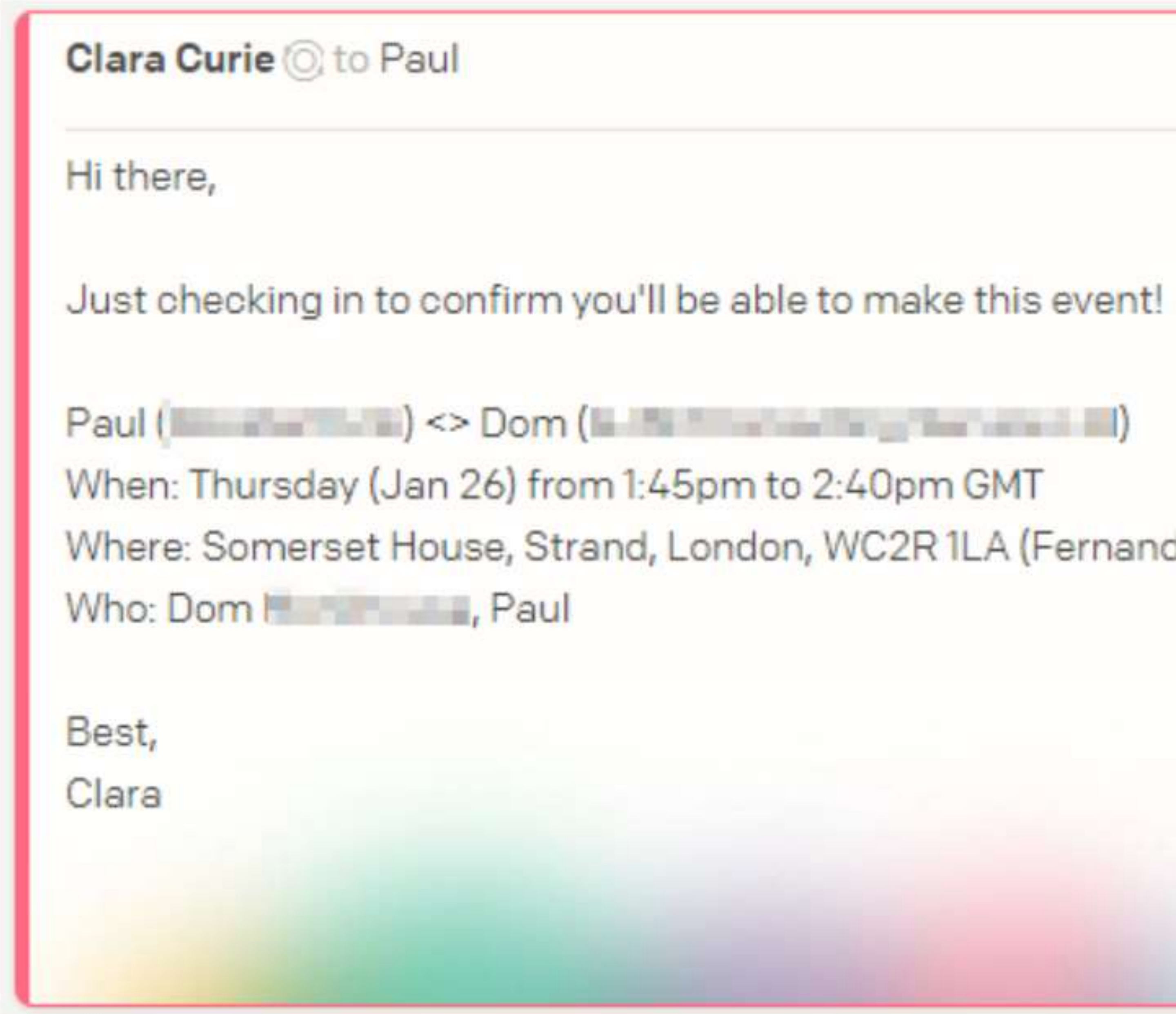
3. Use the customer’s preferred follow-up frequency snooze. Use the "Follow up for phone number" for a phone number or a custom template for location ("Following up here. Where would you like to have this meeting?").

4. Once the needed meeting details are provided, annotate the information accordingly and send the 'Update Event' template.

5. If the job reopens after the confirmed time, and you were not provided with the missing details, use the "Ask customer if they were able to connect" template to tell the customer that you're willing to reschedule in case the meeting did not end up happening. This template may populate the wrong name, so make sure the template includes the participant’s name in the line asking if they were able to connect. If there are any participants included on the email, remove them as this is considered internal communication

Meeting Reminders

Some customer's preferences are set up so that meeting reminders automatically generated by the system are sent to participants one day prior to the meeting.



Clara Curie to Paul

Hi there,

Just checking in to confirm you'll be able to make this event!

Paul ([redacted]) <> Dom ([redacted])
When: Thursday (Jan 26) from 1:45pm to 2:40pm GMT
Where: Somerset House, Strand, London, WC2R 1LA (Fernand
Who: Dom [redacted], Paul

Best,
Clara

1. If a participant confirms attendance, use the "Thanks for confirming" template.
2. If a participant declines or notes they need to reschedule, please see here.
3. If an Optional participant declines, take no action.
    i. If the Optional participant declines and asks to not be included, please see here.

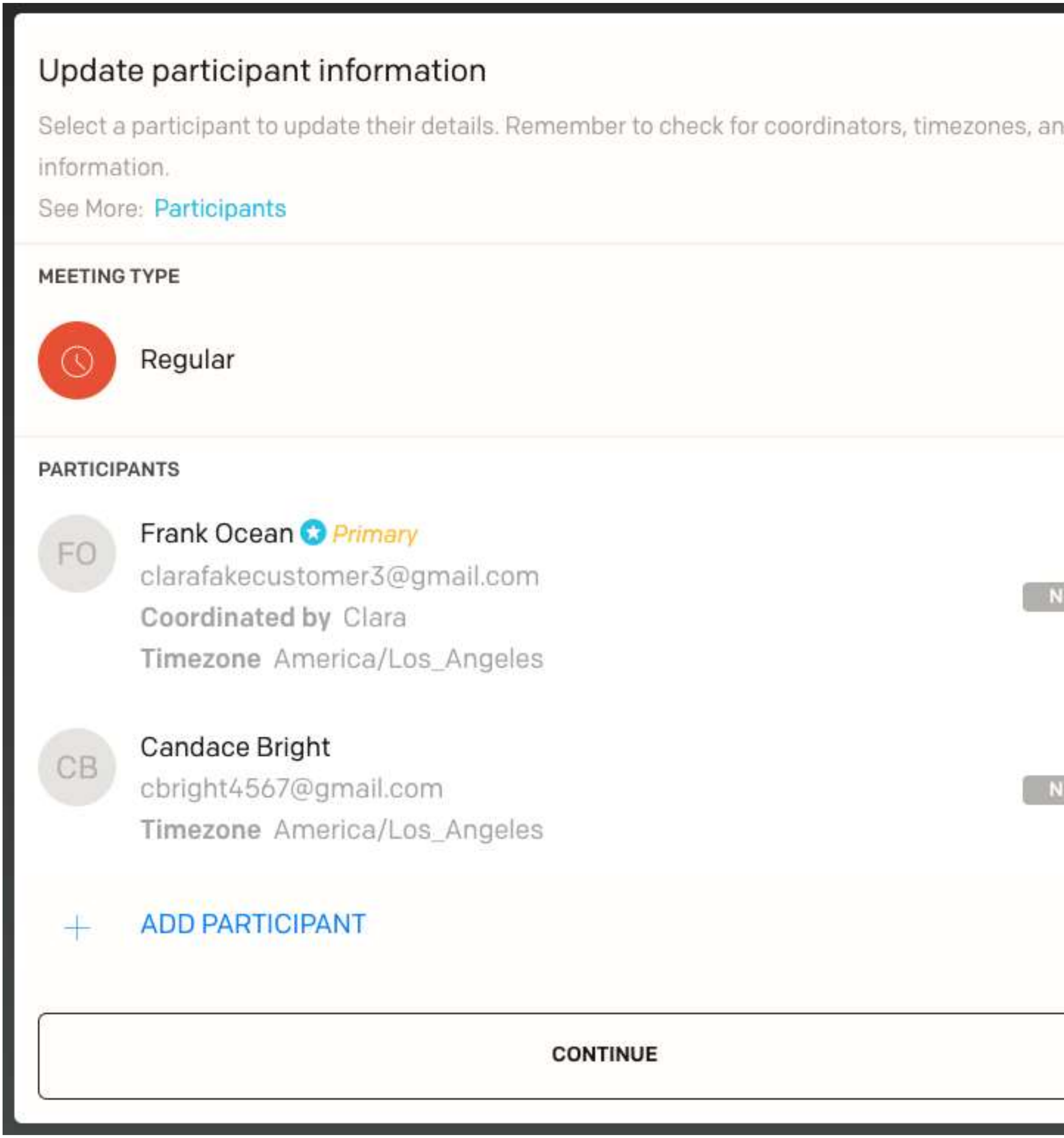
Accepted Invites

If the job you're assigned to has only an accepted invite, *process with no action*. **Note: These should not be merged in to the job with the confirmed event.**

Maybe/Tentatively Accepted Invites

If a customer or participant selected "maybe" on the calendar invite, *process with no action*.

No Reply on Invites



FYI - No Reply: Keep in mind that meetings often happen without the customer or participant accepting the invite. You'll likely see "NO REPLY" next to their names. No action needs to be taken, in this case.

Participant asks Clara to Confirm a Scheduled Meeting

Participant: "Would you please confirm my call with ((Customer)) today?"

1. Check the customer’s calendar. If there are no conflicts, use the "Confirm meeting is on calendar" template to tell the participant that the event is still on the customer's calendar.

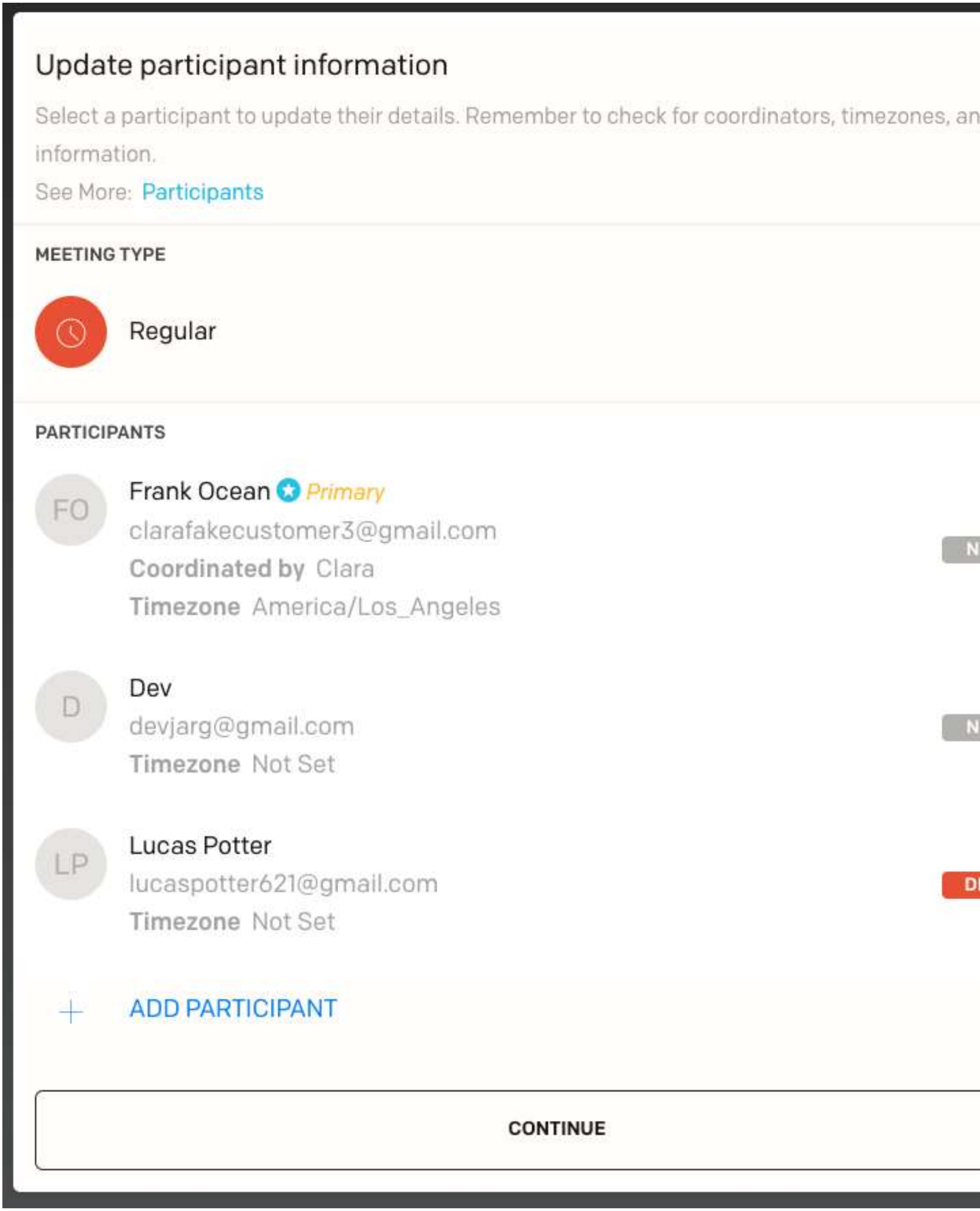
2. If there are conflicts, escalate to Admin so we can determine whether the conflict was already present when the meeting was confirmed. Admin will give you instructions on how to proceed.

Declined Invites

Sometimes, after an invite has been sent, the time no longer works for one or more people (as pictured below). The following section will walk you through the most common scenarios for Declines.

!□

All declined invites require action, unless the participant is optional. If the decline is not in the thread and you are unsure where it belongs, please escalate.


Update participant information
Select a participant to update their details. Remember to check for coordinators, timezones, an
information.
See More: Participants
MEETING TYPE
Regular
PARTICIPANTS
FO
Frank Ocean Primary
clarafakecustomer3@gmail.com
Coordinated by Clara
Timezone America/Los_Angeles
D
Dev
devjarg@gmail.com
Timezone Not Set
LP
Lucas Potter
lucaspotter621@gmail.com
Timezone Not Set
ADD PARTICIPANT
CONTINUE

Declined Meetings Before The Scheduled Time (One day or more)

Customer Declines Invite for a Non-Recurring Call or Meeting *Before* it Occurs

1. Select "Customer declined event" on the Times step. This will remove the invite from the calendar. Do not suggest new times.

2. Proceed to the Composer step.

3. Use the Regular "Reschedule" template (Non-Strikeout) and answer the prompts as per context. **(Do not use the "Missed (Event has passed) (2)" option, as it will generate incorrect verbiage.)** Before clicking the "Next" button after each prompt, it's critical that you allow Exo to finish loading. When you answer each prompt, you should notice three moving dots at the bottom left of the job. This means Exo is loading. Let the job finish loading before selecting "Next" to move to the next prompt. Otherwise, the wrong verbiage may populate.

Participant Declines a Call or Meeting *Before* it Occurs (Only Participant in the Meeting)

1. Select "Needs reschedule" to remove the invite from the calendar.

2. Suggest new times.

3. Select the "Reschedule" template and answer the prompt with "Other."

4. Select "yes" when Exo asks if the participant is aware of this request. (They are aware because they *declined*.)

One Customer Declines Invite with Multiple Customers/One Participant Declines Invite with Multiple Participants

1. Check to make sure the participant or customer is not optional. If they are, follow this protocol.

2. ***Do not remove the declining person from the Participants step, and do not delete the invite.***

3. Use the "Multiple participants or customers, one declines" template to ask the person who declined whether they need to attend the meeting.
4. If they respond that they do not, remove them from the Participants step.

Participant or Customer Declines Invite the Day the Event is Supposed to Occur

1. If the **customer** declines, follow this protocol
2. If the **participant** declines, follow this protocol

Participant or Customer Declines Invite One or More Days After the Event was Supposed to Occur

Process with no action. Reschedule only if requested by customer or participant.

Customer Declines Invite for a Specific Instance of a Recurring Call or Meeting, or Declines Entire Recurring Series

It can be difficult to determine if a meeting is recurring, but one way to tell is if you are unable to find the meeting in the Scheduled tab and you don’t see anything recent under the In Progress tab. Sometimes, you may be able to find it if the Customer has declined the same event multiple times in the Communication tab. If you come across one that is clearly recurring or you just aren’t sure, escalate to Admin.

Note: Do not move this to another request.

Declined: Work Time @ Fri Oct 7, 2022 3pm - 4pm (PDT) (clara@claralabs.com)

SELECTED MESSAGE

Roger Waters to Clara Oct 5th

Work Time
clarafakecustomer2@gmail.com has declined this invitation.

https://meet.google.com/kns-qyap-kjy?hs=224Join with Google Meet
Meeting link
meet.google.com/kns-qyap-kjy
Join by phone(US) +1 941-462-3697
PIN: 534427128
More phone numbers

WhenFriday Oct 7, 2022 · 3pm – 4pm (Pacific Time - Los Angeles)
Guests

clara@claralabs.com - organizer
clarafakecustomer2@gmail.comView all guest info

Invitation from Google Calendar
You are receiving this email because you are subscribed to calendar notifications. To stop receiving these emails, go to Calendar settings, select this calendar, and change "Other notifications".
Forwarding this invitation could allow any recipient to send a response to the organizer, be added to the guest list, invite others regardless of their own invitation status, or modify your RSVP. Learn more

Assigned to Prediction Automation

Other Decline Scenarios

An Auto-Declined Invite is Received, Because the Customer or Participant is Out of the Office (OOO)

For example:

[redacted] to Clara Towers

[redacted] has declined this invi

"Declined because I am out of office"

Call: [redacted]

Reference ID: 5f9b06d1 (Do not delete)

WhenFri Aug 23, 2019 9am – 9:30am Pacific Tim

WhereJulien to call Rob at TBD ([map]
(https://www.google.com/maps/search/Julien+t
hl=en))

[redacted]

Who•

clara.towers@claralabs.com - organizer•

[redacted]

1. ***Do not delete the invite.***
2. Send the "Customer/participant auto-declined invite" to the person who auto-declined the invite.

Customer Declines Travel Invite

1. Verify the customer declined ***only*** the travel invitation. Look for "Travel to (location)" and "Travel from (location)" in the subject line or body of the email.
2. Archive. We don't do anything with travel declines.

New Time Proposed

Customers or participants can propose a new time for a currently scheduled meeting.

Friday Meeting

Proposed new time: Call: Cat <> Meghan (Clara Labs) @ Mon Sep 19, 2022 9am - 9:30am (P

Declined: Call: Cat <> Meghan (Clara Labs) @ Mon Sep 19, 2022 9am - 9:30am (PDT) (cla

Meghan Miller to Clara

Call: Cat <> Meghan (Clara Labs)
Meghan Miller has replied "Maybe" to this invitation and proposed a new time:
Mon Sep 19, 2022 10am – 10:30am

Reference ID: 06e3cf89 (Do not delete)
WhenMonday Sep 19, 2022 · 9am – 9:30am (Pacific Time - Los Angeles)
LocationMeghan to call Cat at TBD
View map
Organizer
clara@claralabs.com
Guests

Cat
Meghan MillerView all guest info

Invitation from Google Calendar
You are receiving this email because you are subscribed to calendar notifications. To
Calendar settings, select this calendar, and change "Other notifications".
Forwarding this invitation could allow any recipient to send a response to the organiz
others regardless of their own invitation status, or modify your RSVP. Learn more

In the example above, the proposed time is in the time zone noted below it (9am PDT), even though the participant and customer's time zones may be different. If there is no clear time zone, **please escalate to Admin.**

1. If the proposal is not visible in Exo, please escalate to Admin. We'll manually check and let you know the proposed time in the escalate notes.

2. If the participant proposed the new time and it works within the customer's preferences, update the invite to the new time. If it does not work, let them know it doesn't work for the customer and suggest new times. If the invite was declined when they proposed a new time, remove the invite from the calendar as well.

3. If the customer proposed the new time and it doesn't conflict with anything on their calendar, use the Reschedule template to ask the participant if that time works for them as well. If there is a conflict on their calendar, see here

Scheduling Recurring Events

1. **No action required in the Times Step.** Please see the Composer Step

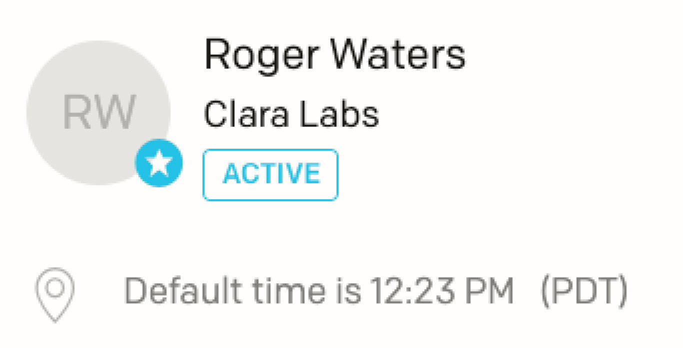
Same Day Scheduling

If the customer suggests or agrees to a specific date in the future, you may confirm a time on that date if it's at least 4 hours after the current time. So, for example, if the customer suggests Thursday, and the participant responds on Thursday that 4pm works, you may confirm 4pm only if the current local time for the customer is no later than 12pm.

If the customer does NOT suggest a specific date and the participant responds that they want to schedule the same day, please suggest more times. Use the dropdown menu "Participants asks for same day".

If the customer suggests a meeting for the same day and there is not at least 4 hours between the current time and their proposed time, please loop them in to Support. **Note: If they insist you send an invite ("Clara send the invite anyways"), you can add the event and still loop them in to Support.**

If a Participant Wants to Change the Time of a Meeting Scheduled for Today to a Different Time Today



You can always find the customer's time zone by clicking on their name in the "To" field of the initial email.

1. On the day of the confirmed meeting, if a participant requests to reschedule, you may confirm that time if (1) *it's available*, and (2) *there are at least 4 hours between the current time and the new proposed time*.

So, for example, a meeting is on the customer's calendar for today at 2pm. The participant requests to reschedule the meeting for today at 12pm. You can do so if:

- There are no conflicts
- When you are assigned to the job, it is no later than 8am for the customer (or 4 hours before the newly proposed meeting time). You can confirm the customer's current time by clicking on their name in the thread with the blue circle next to it (screenshot above).

Basically, the goal is to give the customer at least 4 hours to prepare for the meeting.

2. If you don't have at least a 4 hour buffer, politely refuse by suggesting new times. Use the "Participant requests same day change" dropdown menu option on the "Suggest more times" template, and forward the participant's email to the customer using the "Notify customer participant requests same day change" template.

3. If they didn't ask to reschedule or let us know they were unavailable when they requested a different time, leave the current time on the calendar. You can let the participant know their proposed time doesn't work with verbiage similar to the following: "Unfortunately, that time does not work for {{Customer}}. If you would like to reschedule, please let me know and I would be happy to suggest more times."

Participant is Running Late

1. ***Do not delete the invite.***
2. Acknowledge the participant's email using the "Acknowledge information" template.
3. Use "Forward to Customer" template to send the customer the participant's email. Add the verbiage: "Passing this along. {{Participant name}} is running behind schedule and is going to be a few minutes late."
4. Archive.

Someone Possibly or Definitely Missed the Meeting

In "possibly missed meeting" scenarios, email context is not clear whether the meeting took place.

- For example: *"Nobody is answering the phone.", "Do you know whether {attendee} will arrive anytime soon?*" or *"I'm having trouble connecting."*

In "definitely missed meeting" scenarios, email context is explicit that the meeting definitely did not take place.

- For example: *"I had to drop the call."* or *"Sorry, I've left for my next appointment."*

Depending on who emailed, proceed as per below.

Participant's Email Shows that the Customer Possibly or Definitely Missed the Meeting

1. If it's unclear whether the meeting took place, ask the participant whether the meeting happened using the "Ask customer if they were able to connect" template. Choose the "participant" option in the dropdown. Send the "Ask customer if they were able to connect" template to the customer. Choose the "customer" option in the dropdown. *Note: You will need to edit this template so that it states the participant's name*. This will also auto-populate verbiage offering to reschedule, if necessary. Archive job.

   i. If the participant responds back that the meeting definitely did not take place, use the "Acknowledge participant request" to let them know we need to check in with the customer. Do not snooze this request, as we should take no action until the customer responds.

2. If it's clear that the meeting definitely did not take place, send the "Acknowledge participant request" template to the participant and forward the message to the customer using the "No action" template. Do not snooze this request, as we should take no action until the customer responds.

Customer's Email Shows that the Participant Possibly or Definitely Missed the Meeting

1. If it's unclear whether the meeting took place, send the "Ask customer if they were able to connect" template to the Customer. Choose the "Customer" option in the dropdown. This will also auto-populate verbiage offering to reschedule, if necessary. Archive job.

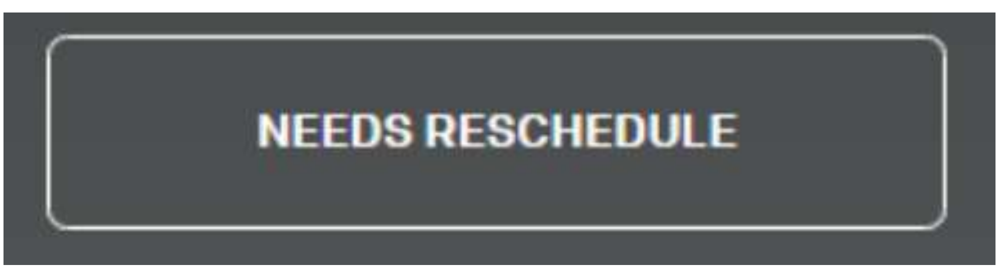
2. If it's clear that the meeting definitely did not take place, offer to reschedule by sending the 'Ask Customer if they were able to Connect' template to the customer. Remove the sentence asking if they were able to connect and archive the job.

Requests to Reschedule, Cancel or Cease Scheduling

Reschedule

1. In the Time step, click on the confirmed event.

2. Click NEEDS RESCHEDULE and proceed with offering new times to the participant using the Suggest New Times or Suggest New Times from Scratch buttons.



3. Make sure to answer the prompts correctly when on the Composer step

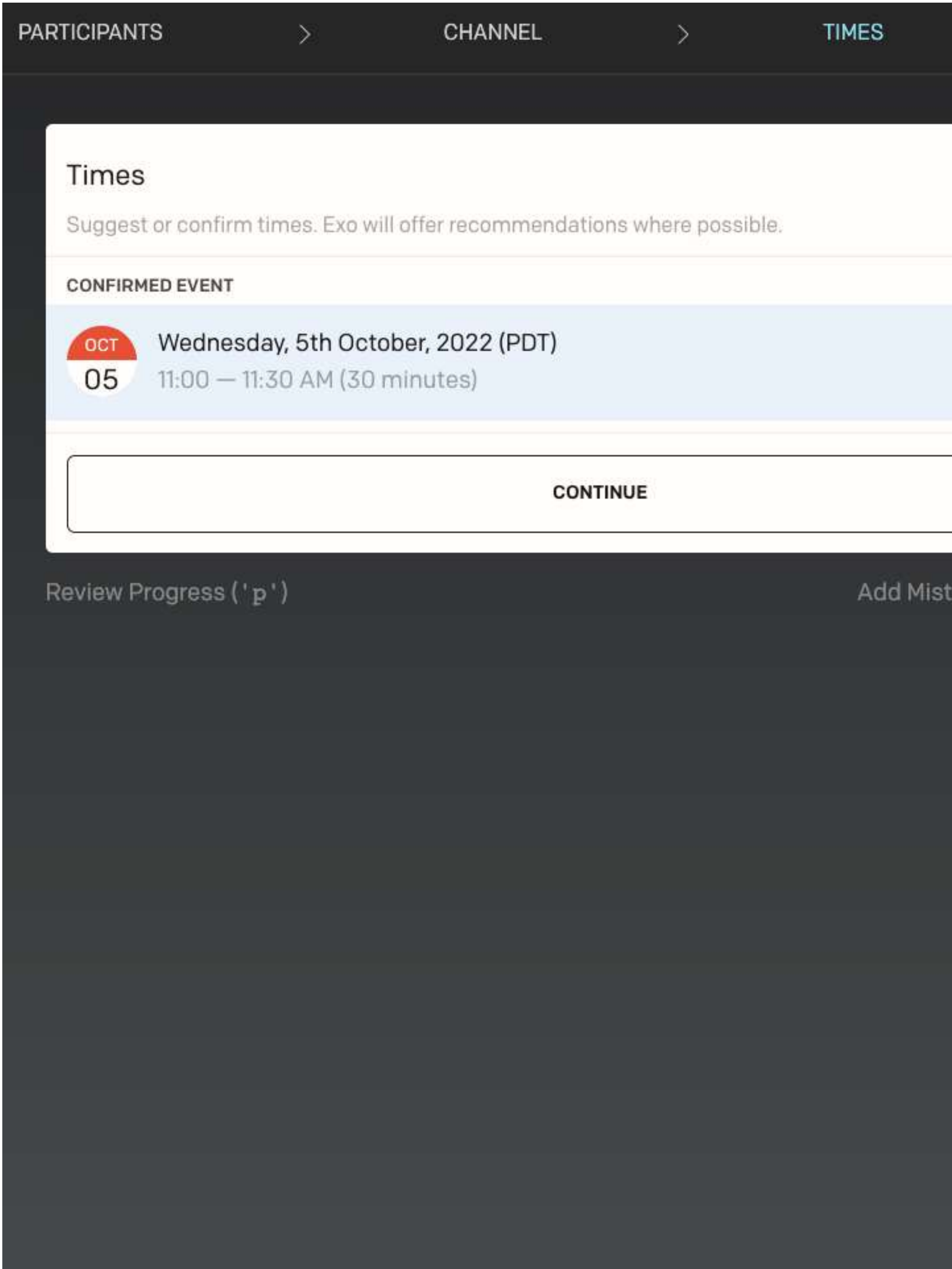
Notes:

- When rescheduling events that we originally scheduled, unless instructed otherwise, make sure the new invite details account for any preference updates (e.g., a change in default location).
- When rescheduling events that Clara did not originally schedule, click here. **This includes rescheduling one instance of a recurring meeting.**
- When rescheduling an event where the participant sent the invite, click here.
- When a specific time is requested for the rescheduled meeting by the customer, click here .
- If the participant is **NOT** looped in on the request to reschedule, add "Something has come up and we need to reschedule" if using the "Strikeout Reschedule" template or follow the prompts when using the "Regular Reschedule" template.

Cancel

1. In the meeting creator, click on the invite.

2. Click CANCEL EVENT to delete the invite. (This will also send automatic cancellation notifications.)


PARTICIPANTS
CHANNEL
TIMES
Times
Suggest or confirm times. Exo will offer recommendations where possible.
CONFIRMED EVENT
OCT
05
Wednesday, 5th October, 2022 (PDT)
11:00 — 11:30 AM (30 minutes)
CONTINUE
Review Progress ('p')
Add Mist

3. Use the "Cancel Event" template to acknowledge the customer's email.

Cease Scheduling Efforts

Customer: "*Clara, please stop scheduling*" or "*Clara, I'm no longer interested in meeting.*"

1. Take no action in the Times Step.
2. Use the "Acknowledge information" template to acknowledge the customer's email.
3. **Do not** proactively reach out to the participant with the "Customer requests stop scheduling" template. Use it only if the customer instructs, or the participant reaches out to us after the customer requests to stop scheduling.

Participant: *“Clara, I’ve accepted an offer for another job.”* or *“I don’t think this call is necessary.”*

- See here for how to handle

Note: If the participant responds again in the thread and **ONLY** Clara is CC'd, please use the "Passing this along" template and remove the snooze to forward the message to the customer and send the "Acknowledge participant" template to the participant. If the customer is CC'd on the email, no action should be taken and the job should be archived. No other action should be taken unless the customer specifically asks us to continue scheduling.

Reschedule or Cancel Multiple Meetings

Customer: "*Clara, please reschedule all my meetings today.*"

1. Copy the message to the requests that need to be rescheduled or canceled, as per the instructions here . If you are unsure where to copy the email or are unsure you can copy them all before running out of time, please escalate.
2. Use the "Acknowledge information" template to acknowledge the customer's email.

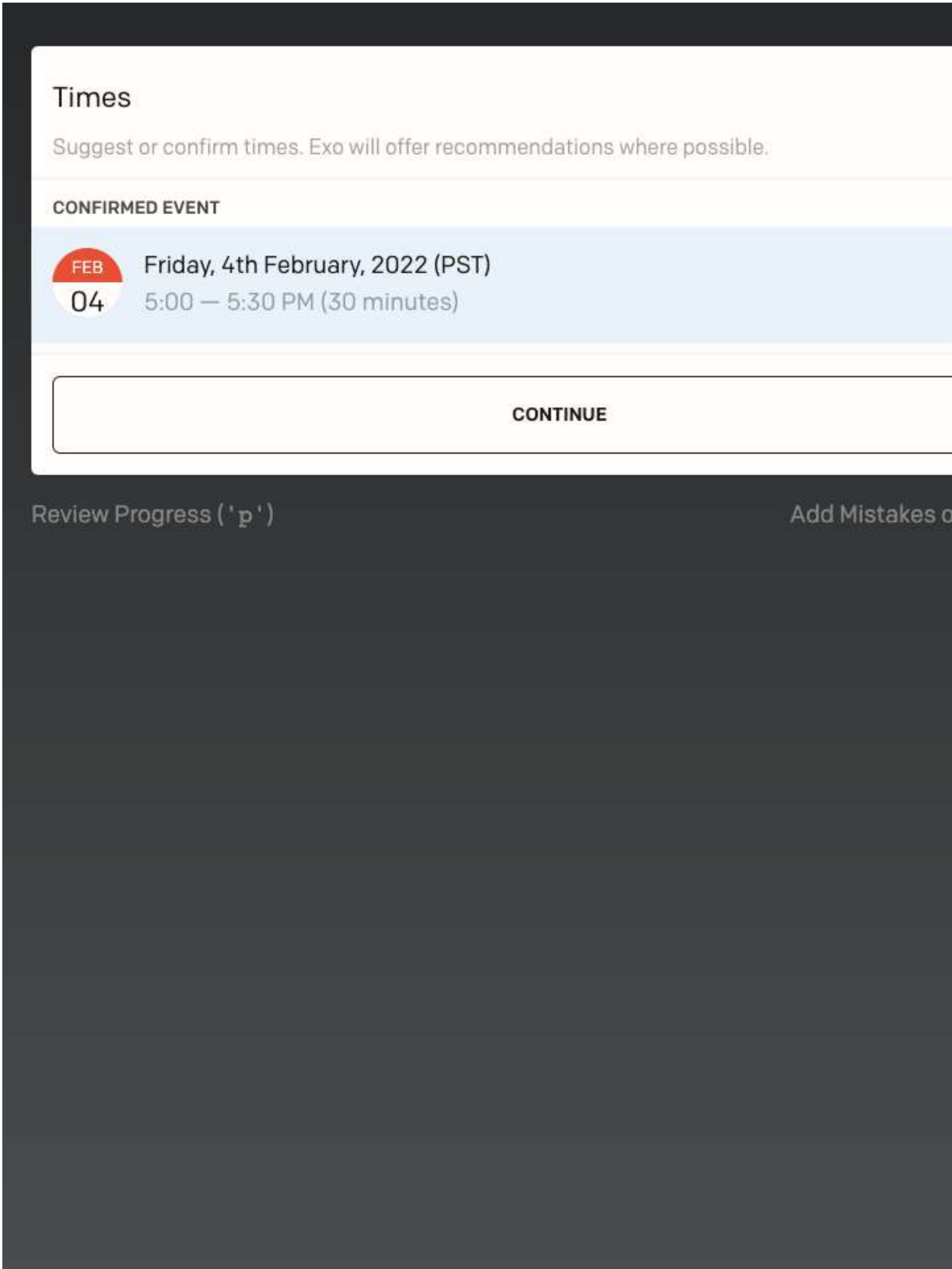
Rescheduling Events Clara Didn't Originally Schedule

Sometimes a customer or participant will send in a new request that has meeting details in the previous context and they ask us to reschedule. We need to check a few details before moving forward.

1. **Did another Clara schedule this meeting?:**
    i. If email context shows that a different Clara assistant scheduled the original event, escalate to Admin, so that CRA Support can check whether the other assistant is still active. They will give you instructions on how to proceed.
    ii. If it's not, continue to question 2.
2. **Does this belong with another meeting we scheduled?:**
    i. Check the Merge tool to see if they are referring to a request we coordinated. It's easiest to search by participants, but you can also search by the Customer and the date that the meeting is scheduled for (under the Scheduled tab) You can find more tips here. If you find that we did coordinate originally, merge the request in to the original for rescheduling.
    ii. If you cannot find the original request in Merge, but you suspect we scheduled the event, you can escalate to Admin to check.
3. **If the answer is no to the above questions, proceed with rescheduling:**
    i. If the original parameters are found in the prior context (Participants, duration, channel type, title), preserve these details when setting up the Exo flows. **If it is a virtual meeting, do NOT use the original link**. If the customer has the same type of link (Zoom, Teams, etc) in their preferences, select that option. If they do not, use their default.
    ii. If the information isn't visible in the email thread, use the customer's defaults. **Do not** go to the Times Step to find the original details and then go back to fill them in.
    iii. In the Composer Step, let the customer know that you cannot delete it, because you did not create it using the "Let customer know can't delete invite" template. **Please note, this template should be sent whether or not you see the old invite on the customer's calendar. We are letting them know we cannot move, edit or alter the original invite in any way.**

Participant Doesn't Want to Meet and an Invite has Already Been Sent

1. Click CANCEL EVENT to delete the invite. (This will also send automatic cancellation notifications.)


Times
Suggest or confirm times. Exo will offer recommendations where possible.
CONFIRMED EVENT
FEB
04
Friday, 4th February, 2022 (PST)
5:00 — 5:30 PM (30 minutes)
CONTINUE
Review Progress ('p')
Add Mistakes o

2. Use the "Inform customer of participant cancelation" template to let the customer know the participant no longer wants to meet. Archive.

3. Send a separate email to the participant using the "Acknowledge information" template to acknowledge that the invite has been removed. Archive

If no invite has been sent, see "If the participant doesn't want to meet and no invite has been sent" in Participants step.

Flights

When customers forward their flight itinerary/ticket, we default to adding it to their calendar. If details are clear, you can add them to Exo. If the details aren't visible or are difficult to read due to formatting, please escalate up to Admin and we will manually provide flight details.

- If there is only 1 flight, add it to the customer's calendar.
- If there are 2 or 3 flights, copy the email to a new job for each additional flight and add the first flight on the job you are assigned to.
- If there are more than 3 flights, loop in Support.

When setting up Exo to add the flight, leave the location as TBD and change the duration to match that of the flight. Departure times and arrival times are location-dependent, so be sure you are taking the time zone difference into account when setting up the duration. If the customer is departing from New York and is arriving in London, departure time will be in EST/EDT and arrival time will be in GMT/BST.

On the Event step, format the title in the following way:

{Flight number} / Depart {airport abbreviation} {departure time + time zone} / Arrive {airport abbreviation} {arrival time + time zone}

- *E.g., AA#123 / Depart SFO 2:10pm PDT / Arrive JFK 7:30pm EDT*

Reminder

By default, we don't schedule calls and meetings 2 hours before and after flights.

Holds

To add or delete holds on any given job, we must be explicitly directed to do so. A hold is for a meeting that requires scheduling. If a customer asks to add a hold for an event that has already been confirmed, see Add an Event Directly to the Calendar.

Customer Asks Clara to Place a Single Hold on the Calendar

1. Add the hold. Preface the event title with "**HOLD:**". For example: "HOLD: All-Hands Meeting."
2. Confirm with the customer that the hold has been calendared using the 'Customer requests hold' template.

Customer Asks Clara to Place Multiple Holds on the Calendar for One Event

(The customer states: "Please hold 3pm, 5pm and 6pm as potential meeting times.")

1. Loop in Support

Participant asks Clara to Place a Hold for a Certain Time They Might be Available to Connect with Customer

When a participant asks Clara to place a "tentative hold" for a certain time, send an invite for that time anyway.

1. Use the "Confirm Add to Calendar" template, with the "Participant requests hold" dropdown menu option to let them know that you've sent invites to reserve the time slot.

Participant asks Clara to Place Multiple Holds for Times They Might be Available to Connect with Customer

1. Send an invite for the first time they requested.
2. Use the "Confirm Add to Calendar" template, with the "Participant requests hold" dropdown menu option to let them know that you've sent invites to reserve the first time slot, but add verbiage to let them know you can only hold one time.

3. If they respond back that they would prefer one of the other times, confirm the time, if it is still available for the customer and send the "Updated Invite" template.

Calendar Annotation Requests

Sometimes the customer will mention travel or ask for us to block certain dates **temporarily**. It's important to have all of the information before moving forward, so we can accurately annotate customer's calendars. If a customer asks for a permanent change, see Customer Preference Updates.

Customer asks to change PMTs for travel and their preferred meeting times, dates of travel and location are included (Temporary change, less than 2 weeks)

1. Escalate for the PMTs to be changed.

Customer mentions they will be traveling, but provide no information

1. Using the "Custom Reply" template, add the verbiage "If you could pass along your preferred meeting times, dates of travel and location, I would be happy to update your preferred meeting times while traveling." and snooze.
2. When the customer responds, escalate for the PMTs to be changed. If the change is for more than 4 weeks, please loop in Support instead.

Customer asks to change PMTs for travel (More than 2 weeks) or asks to change their time zone temporarily for travel

1. Loop in Support

Customer asks us to not schedule any more meetings on a certain day/week

1. Escalate to add an internal block.

Customer mentions they will be out of the office (OOO), but nothing is annotated on their calendar for that time frame and they provided dates for travel

1. Escalate to add an internal block.

Customer mentions they have a note on their calendar that they will be unavailable and we scheduled in that time frame

1. Loop in Support. (Only loop in Support and do not apologize. Support can educate the customer on how to properly annotate their calendar and will add any necessary blocks.)

Accommodations

When customers forward their hotel reservation with or without instructions.

1. Loop in Support.

RSVP

- If customers request Clara to RSVP to an invite, calendar the event using the available information.

- If customers request Clara to complete a form for the RSVP, loop in Support.

Setting up Reminders

Customer Requests to Set a Reminder for a Particular Date

1. Use the "Customer requests reminder on date" template to acknowledge the customer's request and snooze the email for the requested date.

2. When the job reopens on that date, email the customer using the "Send customer a reminder" template, then archive.

Customer Requests to Set a Reminder for a Particular Time or Time Frame (Morning, Afternoon, etc)

1. In the Channel step, set the meeting as virtual or in-person depending on context.
2. Add a 5-minute invite on the customer's calendar for the time requested.
3. In the Event step, edit the title. Copy and paste the customer's reason for the reminder. Format the calendar event title as follows:

Reminder: ___

For example, Reminder: Pay bills

If Clara is Asked to Schedule with Calendly or Links Similar to Calendly

1. Open the Calendly link and set the time zone to the customer's time zone to make it easy to identify a time that works for both participant and customer. Note: The default time zone for Calendly is your own. Do not annotate a time zone for the participant based on this.
2. If you find a time that works, send an invite. Customize the “Confirm” template to include "Based on your Calendly availability, I've just sent an invite with the following details."
3. If a time doesn't work, suggest new times. Add a line with the following: "Unfortunately, none of the available times on your Calendly work for {{Customer}}."

Practice!

If you'd like to practice using Calendly before using it in Exo, feel free to play around with the link we created for a fake customer we use for onboarding. https://calendly.com/clarafrankocean

If One Participant Provides a Calendly in a Group of Multiple Participants

1. Open the Calendly link and set the time zone to the customer's time zone to make it easy to identify times that works for both that participant and the customer. Note: The default time zone for Calendly is your own. Do not annotate a time zone for the participant based on this.

2. Find mutually available times and suggest them in the Times Step by manually adding them to the calendar.

3. Use the Regular Suggest Times template to suggest those times to the other participants. Add verbiage to let the Participant with the Calendly know that you used their calendar to find available time. Edit first line to address any participants that have not yet confirmed availability.

   i. Example:
   "Thanks Chris! I've noted your availability based on your provided calendar.
   Hi Melissa, Susan,"

If the Participant replies with an Out of Office (OOO) Message

1. Follow protocol here.

If One Participant in a Group of Multiple Participants sends an Automatic Out of Office (OOO) Message (No date yet or returning before the pending meeting date)

1. Continue to follow up with all other participants for their availability. You do not need to send the "Participant out of office" template to the customer.
2. If everyone has responded except the OOO participant, set the snooze to go off when the participant returns.

If One Participant in a Group of Multiple Participants sends an Automatic OOO

Message (Not returning before pending the meeting date)

1. Hold scheduling with the other participants.
2. In the Composer Step, send the "Passing this along how to proceed" to the customer to confirm how they would like us to continue.
   i. If the customers responds to make that person optional, add Clara as their coordinator and continue scheduling with the others.
   ii. If the customer responds to remove that person from the request, remove them from the Participants Step and continue scheduling with the others.
   iii. If the customer wants to wait until the person returns, in the Composer Step, send the "Acknowledge Participant" template. Make sure all participants are on CC. Set a snooze for when the OOO participant returns to continue scheduling.

Protocol for Doodle Polls or Similar Scheduling Tools (Not Calendar based)

1. Click on "Clara Product / Feature Question" in the Composer step and then select either the "Click Link to Schedule" or "Link to Doodle Form" template.

Codewords Relating to the Times Step

There are a few codewords that related directly to the Times Step. A codeword is a phrase that a customer uses in their initial email to Clara that triggers extra instructions to follow.

Accommodate Participants

If Exo detects a codeword with the specific verbiage “accommodate the participant” as an instruction, please process according to the following:

- Schedule between 8am to 7pm M-F.

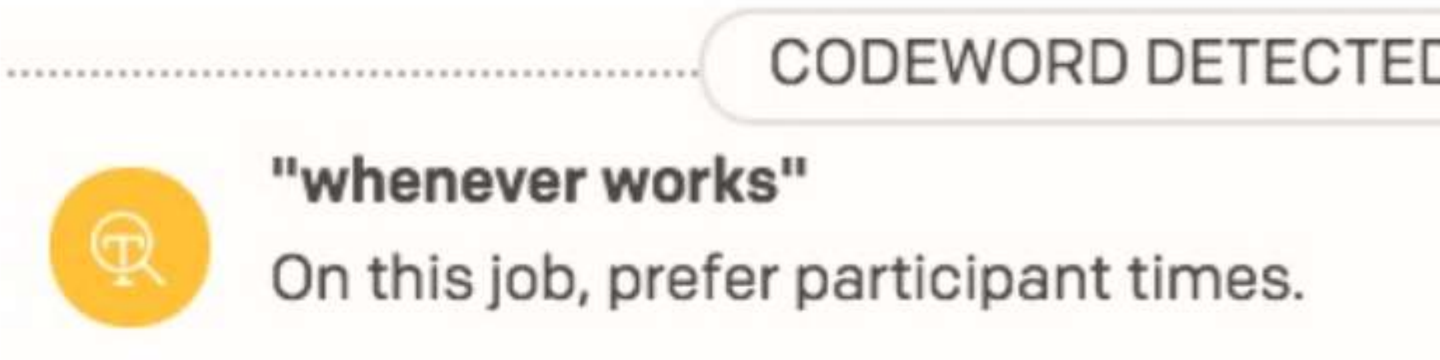
- Ignore the customer's buffer time preference. The codeword intent might say to "set buffer time to 0 minutes." This means the same thing. You don't need to only offer times back-to-back with another event. It just means that if the customer has a buffer preference, you can ignore it.

- Do **NOT** ignore other events on the calendar. If the participant requests to schedule at a time that has a conflict, copy the name of the conflict in the calendar and respond the participant using the "Acknowledge Participant" template. Ask the customer to schedule over the conflict using "Passing this along to Customer" template and add the verbiage: "The time suggested conflicts with {{event name}}. Should I schedule over the conflicting event, or suggest different times to {{Participant}}?"

Prefer Participant Times

If Exo detects a codeword with the specific verbiage “prefer participant times” as an instruction, use the "Ask participant for meeting times" template and do not suggest times.

Note: This only applies to the first reach out. If we don't receive a response, use the Followup One template to suggest times as normal.

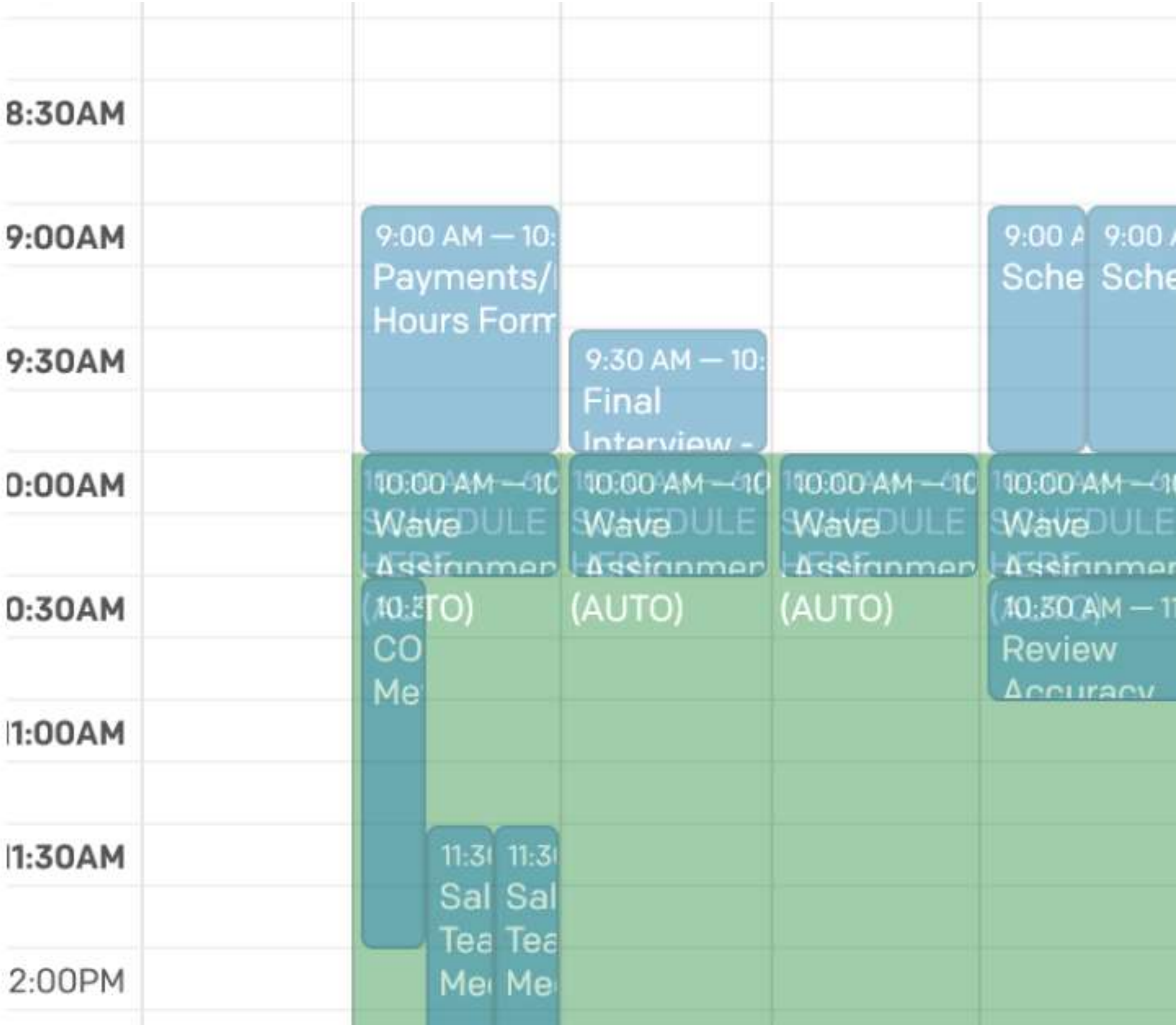


Scheduling Over Internal Meetings

Customers have a codeword they can use that allows Exo to suggest times over internal meetings in order to schedule a meeting sooner. An internal meeting is defined as an event the customer puts on their calendar as a reminder, or a meeting with just their work colleagues.

Internal events will appear transparent in Exo, as pictured below. When it is used, we can suggest and confirm times over the transparent events, if the customer doesn't have any open availability in the next few days. We can also ignore buffer preferences with this codeword.

The only thing to keep in mind with scheduling over transparent events is to make sure the event is **not** a flight. Please be sure to leave the 2-hour window before and after a flight, as per protocol.



Important:

Please note that this codeword is the **only occasion** we may suggest times over a conflict without the customer's permission. For all other requests, we still need to check with the customer before suggesting or confirming times over other events.

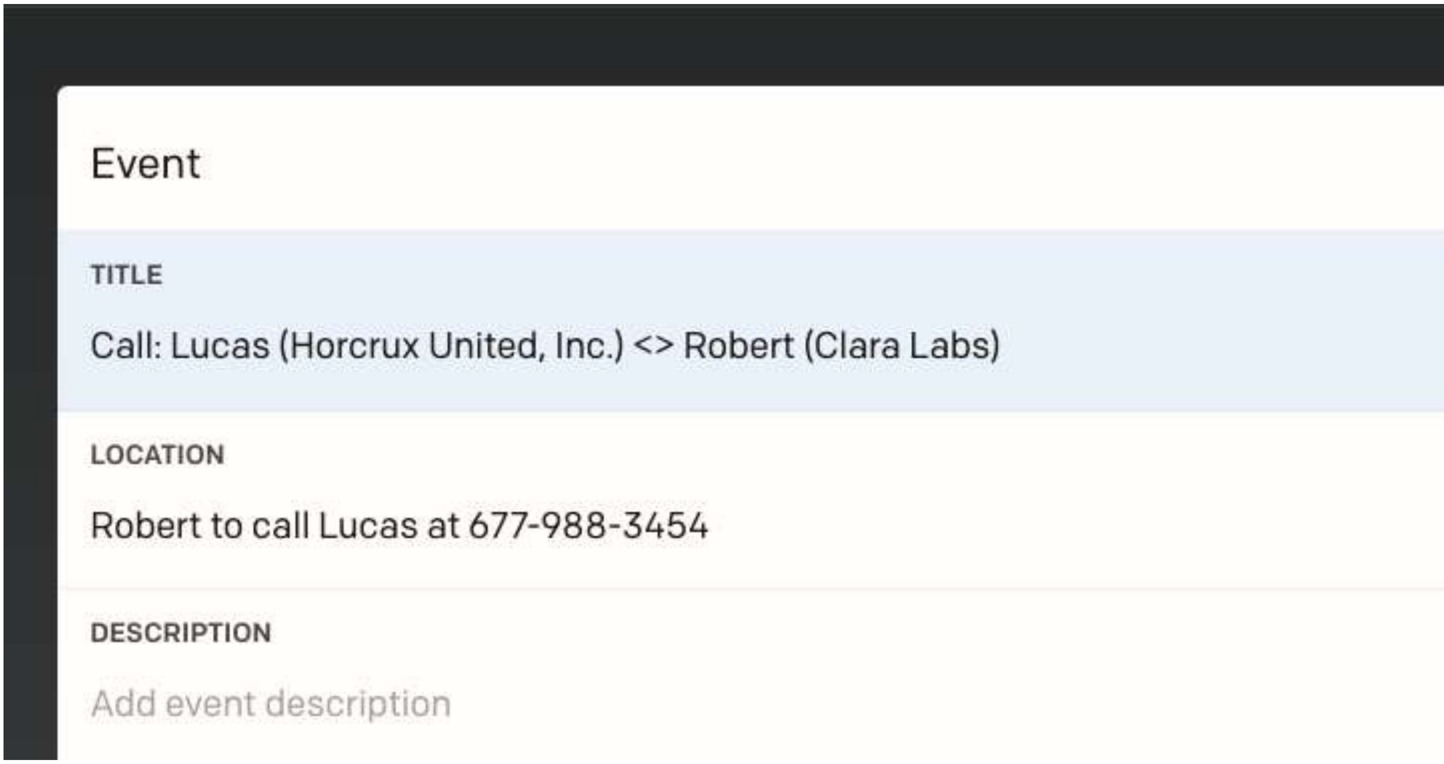
As a reminder, if a customer provides instructions that conflict with a codeword, follow their instructions over the codeword intent.

Event

Suggest Edits

The **Event step** is where you can preview the calendar invite's title, location, and description.

Event Title



The Event Title field is editable. It should reflect all of the meeting's attendees, including the optional attendees.

Exo will automatically generate the title when the job is initially set up. After that, the system will show the title as the "Custom" selection.

If the "Custom" selection is correct, leave as is.

If the "Automatically Generated" option is correct, you may select this option. It will copy to the "Custom" box and save it.

Caution:

*You should **not** be adding information from the customer's calendar in the Times Step. The titles should only be generated by information available in the thread and annotations in Exo.*

Exo Title Generation and Formatting

How Exo automatically formats the title depends on the customer's preferences, but should always be set up as **Participant(s) <> Customer(s)**.

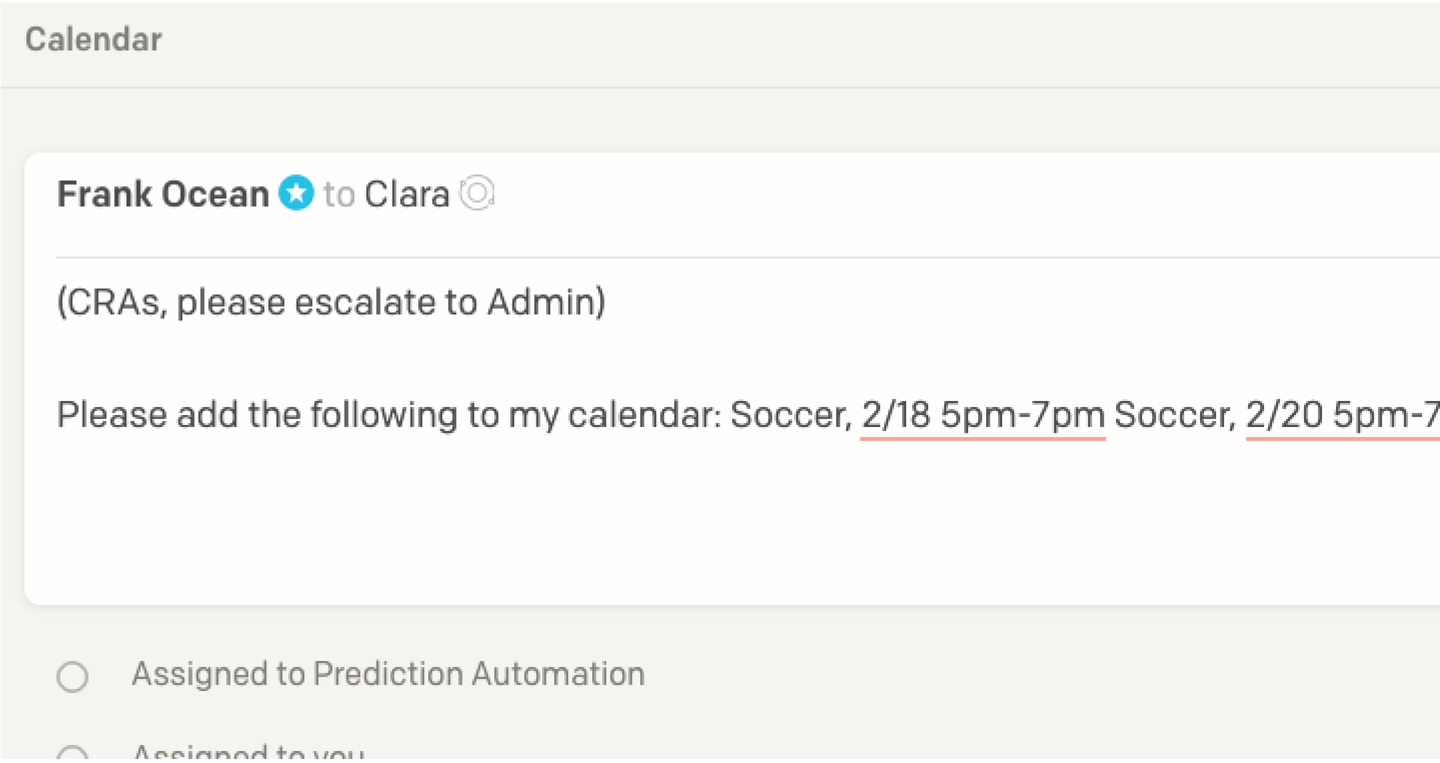
Customize the title only when:

- Requested by the customer
- Requested by a participant
- Exo is attributing a participant to the Customer side (right side) and they do not have the same company as featured in the customer's preferences. This can occur if the customer has multiple domains in their preferences and a participant with the same domain is added.
    - For example, John has "Apple" as their company, but emails from @claralabs.com and includes Tina (tina@claralabs.com). Since Tina has a different company than John's preference's company, we need to attribute Tina to the left side: Call: Tina (Clara Labs), Frank <> John (Apple). This includes when the customer does not require a company name in their preferred email format: Call: Tina, Frank <> John
- The automatically generated title does not attribute the correct company name to the correct participant. Exo is only able to add one company name to the event title, and it doesn’t always add the company name to the correct participant. You will need to edit the title to make sure the company name is attributed to the correct participant and to add any additional company names if there are multiple present.
  _ *Example: (Multiple companies): Call: Tina (Clara Labs), Kevin (Teamable) <> Sarah (Apple)*
  _ *Example: (Multiple participants, different companies): Meeting: Tina (Clara Labs), Kevin, James, Riley <> Sarah (Apple)*

Note: When multiple participants are present and you only have the company name for one participant, that should be annotated first.

- We're working with a coordinator but don't have the actual participant's email address - edit the title to reflect the participant's name, not the coordinator's name (See here for more information)

- We're adding an event directly to the customer's calendar with no participants - customize the title to represent the event we are adding. You may be able to copy and paste the title of the email as the title of the event as well. The rule of thumb is to keep it simple, and a few examples of how to title an event are below.
  Customer asks us to add a seminar on recruiting to their calendar. You can title it "Recruiting Seminar."
  Customer forwards us a thread that confirms a dinner meeting with Bob, but only wants the invite added to their calendar. You can title it "Dinner with Bob."



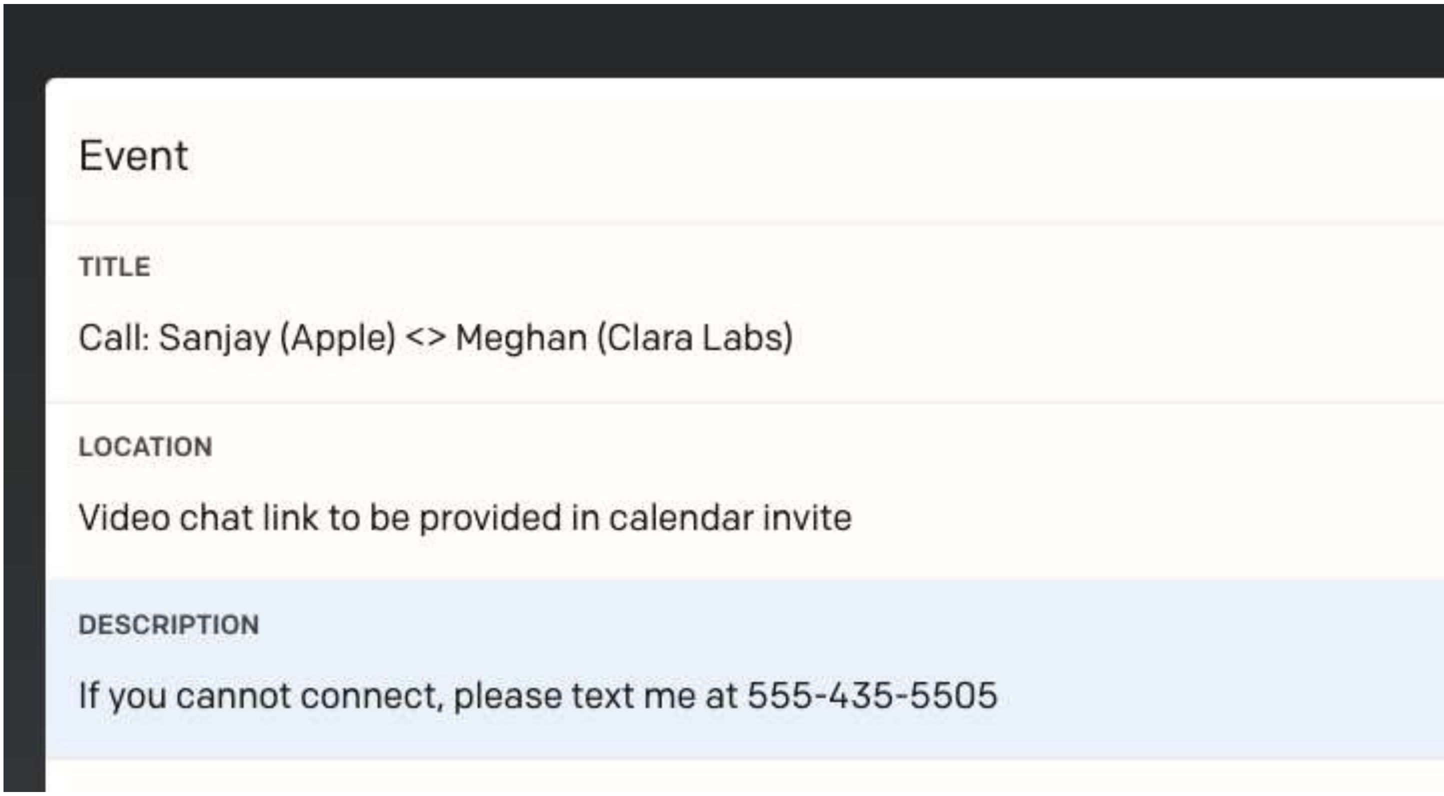
In the example above, the customer references "Soccer", so we should then title the event "Soccer".

Location

The Location Field is non-editable. It shows a virtual meeting's call details or an in-person meeting's location address. To edit this field, you must return to the Channel step. **This is a great place to confirm that your Channel step annotations are correct before moving forward.**

Description

The Description Field is where the instructions relating to the channel would appear. These are Automatically Generated and can no longer be edited.



Custom descriptions are no longer supported.

If a customer asks us to add a custom description to an invite (add a in-person location along with a virtual link, an agenda, extra instructions, etc.), please loop them in to Support.

If a participant requests an agenda to be added

1. Loop in Support.

If the participant provides parking directions or an access ID needed to enter the building.

1. Loop in Support.

Composer

[Suggest Edits]

The Composer Step

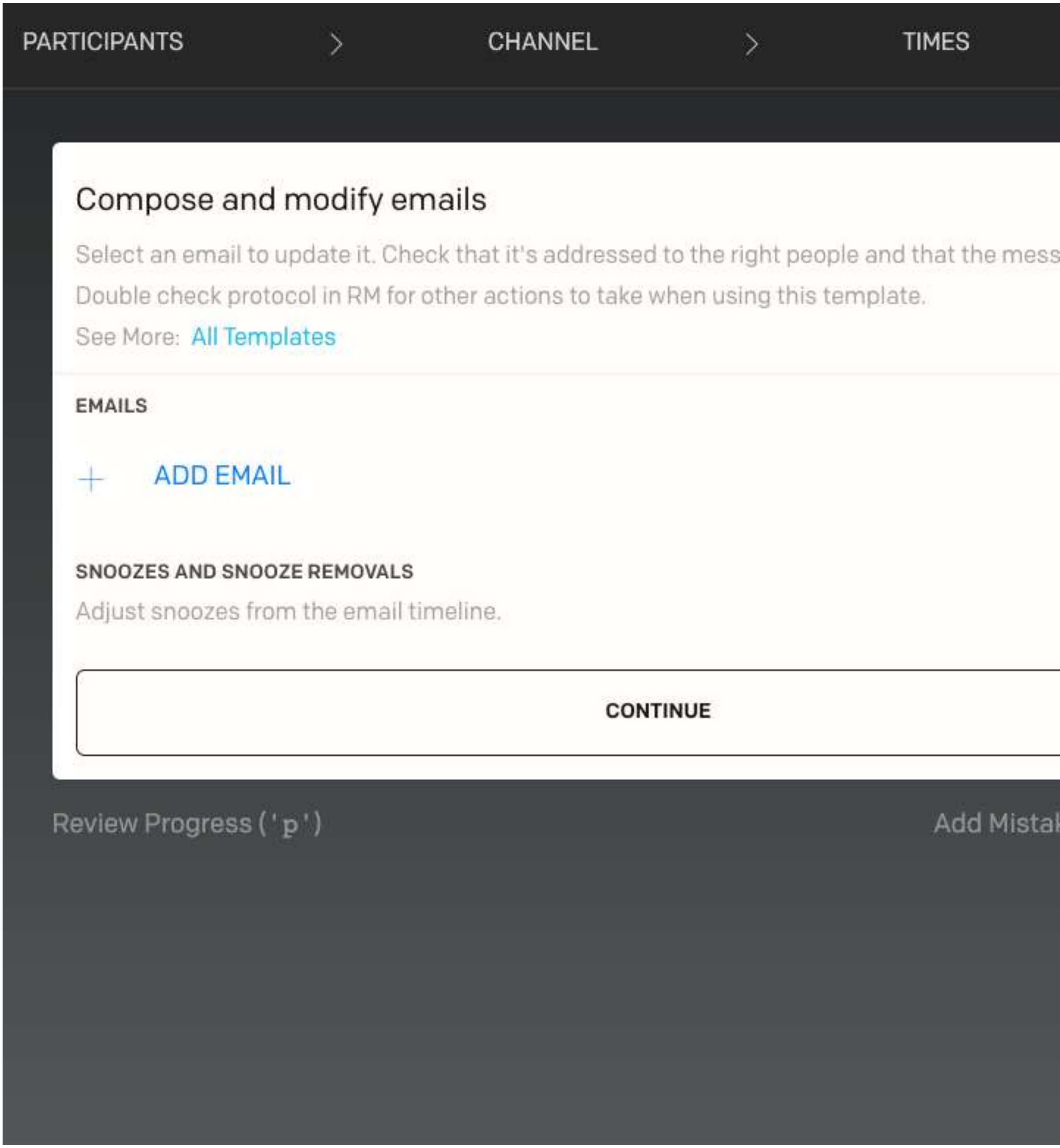
The Composer Step is where you select templates, customize them (ONLY if necessary), apply snoozes, and remove snoozes. Templates were created to need as little customization as possible.

Templates should only be edited if:

1. Information is needed (asking for a phone number, email addresses of colleagues, etc)
2. Required edits (adding in required information, as designated by {{}})
3. Adjusting for context ("Ask to ignore preferred times, conflict, or buffer preference" template, but only outside of preferred times is required)

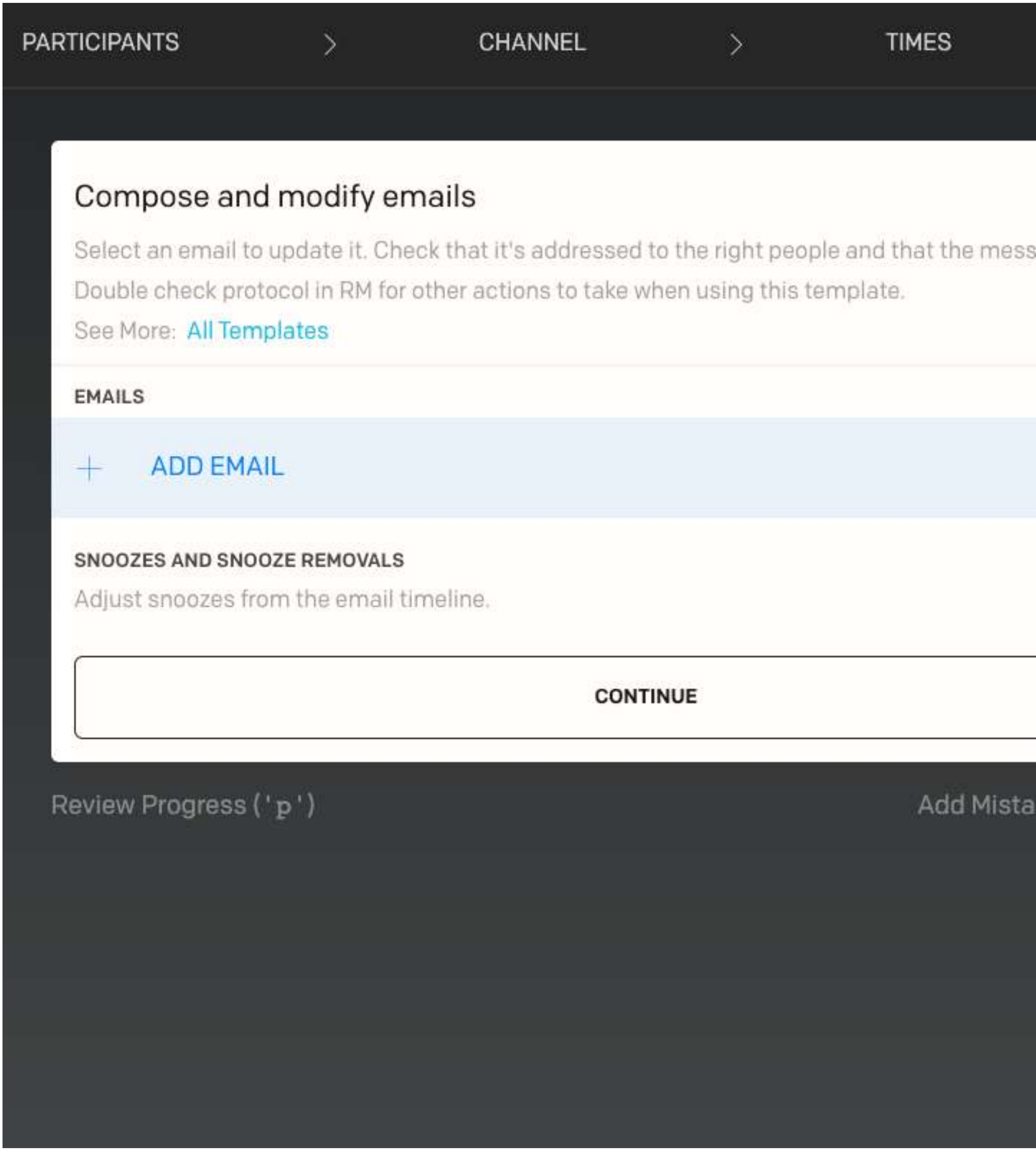
You are expected to use excellent English writing skills and the Clara voice when customizing templates or using custom replies. It is important that all e-mails sent are free of any typos or grammatical errors and mirror the Clara style of language. While many CRAs may work on the same thread, the goal is to sound like one person.

This Composer step article lists templates not already mentioned in other RM articles.



Simply click on "add email" to see the template options! You can use Ctrl + F on Windows or Command + F on Mac to search for the template you are looking for.

Depending on where you are in scheduling, the Worker Bee will suggest templates it thinks are appropriate with the worker bee icon. However, Worker Bee predictions aren’t always accurate, so choose whichever template fits best.



If you choose "Custom Reply" or "Forward Message to Customer", you must select which email to reply to or forward along.

Robert Plant (Clara Labs)
CLARA

Thank you for your interest in Clarabots

Clara to Robert Plant

Hi Robert,

Passing this along. How would you like me to proceed?

Thanks!

Best,
Clara

Clara to Candace Bright

Hi Candace,

I need to clarify something with Robert. I'll get back to you ASAP.

Thanks for your patience!

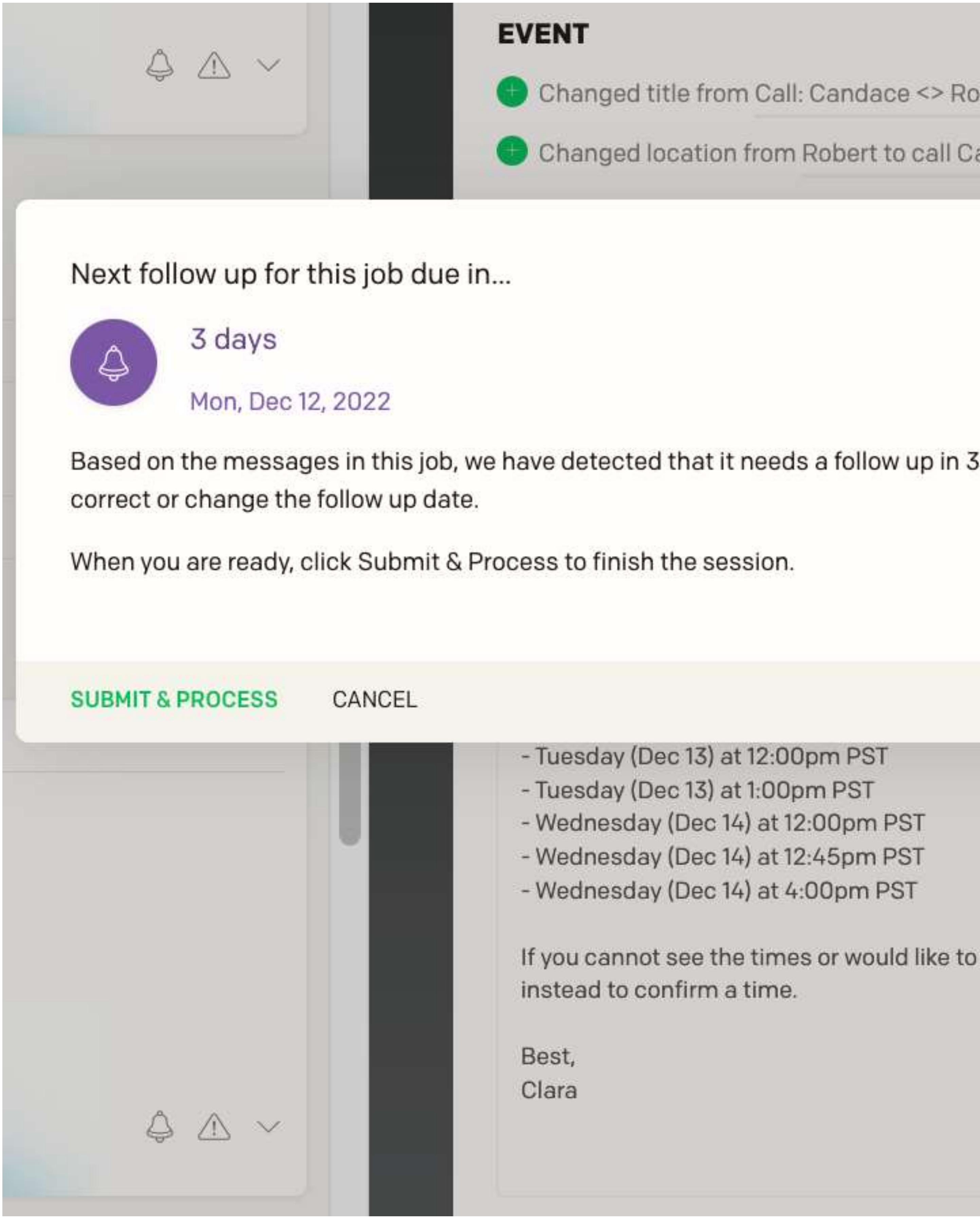
Best,
Clara

Snooze expired on message (#8472886)

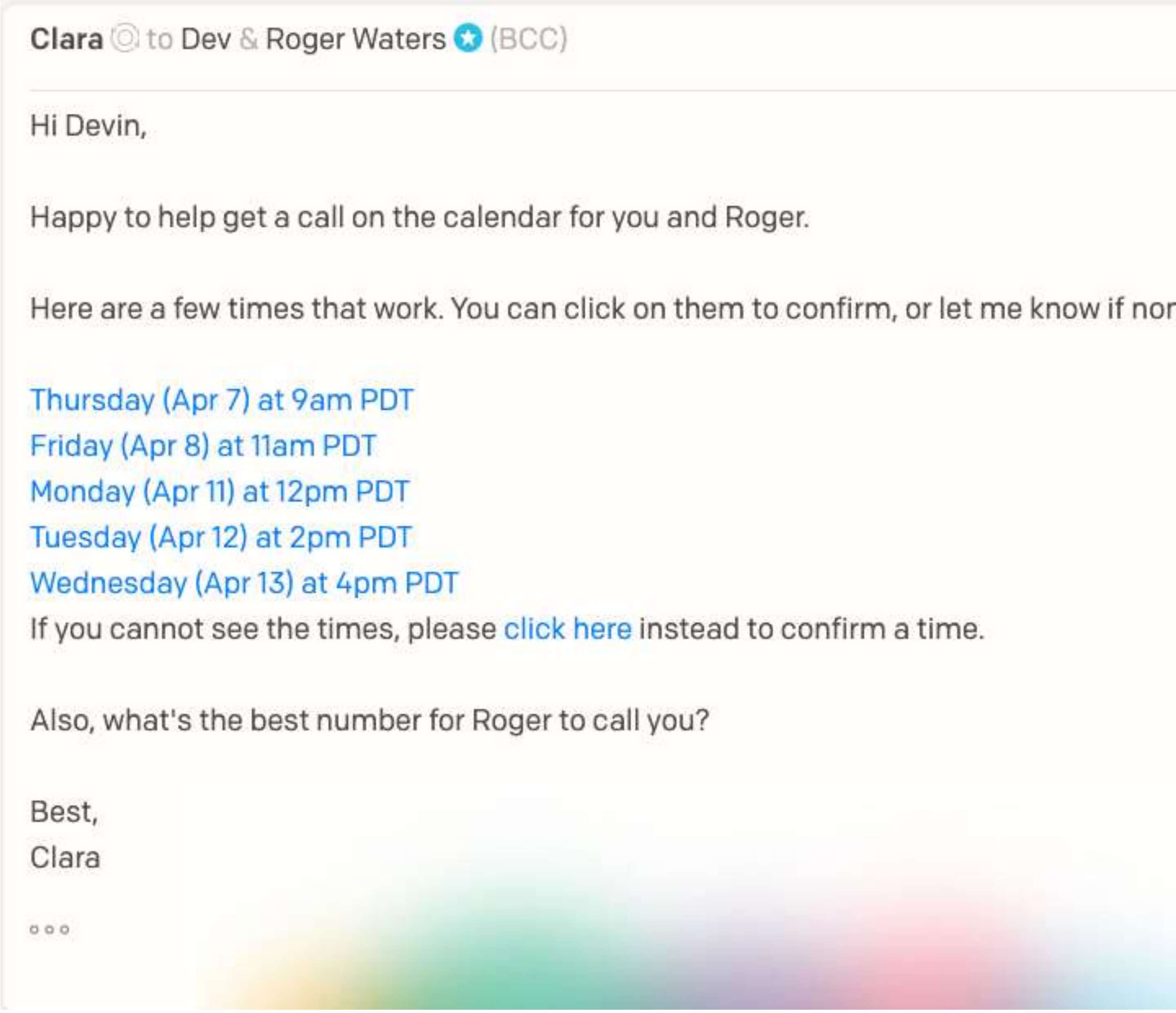
Snoozes

Snoozes are reminders that place the job back in the queue automatically if the participant or customer has not replied. A job can have multiple snoozes if you need to follow up with multiple people about different things. For example, if you are scheduling a Zoom meeting with one participant and you need to get the Zoom information from the customer, you will need to add a snooze to the email to the customer, as well as a snooze to follow up with the participant about their availability for the meeting.

Every time you are assigned to a job, you will work through the flows and send the template that best correlates with the information that is required to schedule the job. If information is needed to complete the scheduling, then a snooze must be on the job for it to reopen if no one has responded. Most templates that need to be followed up on have the snooze already added; however, it is your responsibility to make sure it has the correct snooze.This includes removing old snoozes that are no longer necessary. You will be prompted before submitting if there is a snooze on the job. If the time does not match with a snooze you have added or a snooze is no longer necessary, please go back and check the thread for old snoozes.


EVENT
Changed title from Call: Candace <> Ro
Changed location from Robert to call Ca
Next follow up for this job due in...
3 days
Mon, Dec 12, 2022
Based on the messages in this job, we have detected that it needs a follow up in 3
correct or change the follow up date.
When you are ready, click Submit & Process to finish the session.
SUBMIT & PROCESS
CANCEL
- Tuesday (Dec 13) at 12:00pm PST
- Tuesday (Dec 13) at 1:00pm PST
- Wednesday (Dec 14) at 12:00pm PST
- Wednesday (Dec 14) at 12:45pm PST
- Wednesday (Dec 14) at 4:00pm PST
If you cannot see the times or would like to
instead to confirm a time.
Best,
Clara

If you want to add a snooze to an email, simply click the bell icon and add it. If you want to remove a snooze, click on the icon and hit "remove".



Note:

You can click on the ellipsis (the three dots at the bottom) of any e-mail to expand the thread for more context.

You will only be able to view and/or remove a snooze in the timeline when you are on the Composer step.

PARTICIPANTS > CHANNEL > TIMES >

Compose and modify emails

Select an email to update it. Check that it's addressed to the right people and that the mess
relevant. Double check protocol in RM for other actions to take when using this template.

See More: All Templates

EMAILS

\+ ADD EMAIL

SNOOZES AND SNOOZE REMOVALS

Adjust snoozes from the email timeline.

Removing Snooze
To: Robert Plant
Hi Robert, Following up one last time. How would you like me to proceed?
Thanks! Best, Clara On Thu, Jan 6...

Mon, Dec 12, 2022
To: Robert Plant
Hi Robert, Circling back here. How would you like me to proceed? Thanks!
Clara On Thu, Jan 6 2022 at...

CONTINUE

Review Progress ('p') Add Mistakes on Fl

Reminder: It’s your responsibility to ensure that the snoozes for the entire job – and not just the emails you personally sent – are correct. Some snoozes may still appear on older emails and are no longer necessary. These should be removed.

Clara Style

Clara has a unique writing style that is often referred to as “Clara’s voice”. Since there are many people who work on all jobs that come into the queue, it is imperative that the same style of language is used so that Clara sounds like one person. Even though the Clara style may not always be conventional, we ask that you follow the formatting styles of the templates.

For example, when addressing multiple people in the beginning of an email, each name should be separated by a comma, instead of using the word “and”. “Hi Matt, Sarah,” is the Clara style format that should be followed, instead of “Hi Matt and Sarah,”. If there are 3 or more people you need to address, saying "Hi all" is correct over "Hi Matt, Sarah, Josh", as that is how Exo generates the verbiage.

The same pertains to suggested and confirmed times. The Clara style format is as follows: Day of the week (Abbreviation of Month and Date) at Time (am/pm) (Time zone). For example,” Monday (Nov 28) at 3pm PST” is the correct format for a suggested time. “Monday November 28 at 3pm” would not be correct.

If we need to add additional time zones, because the system did not update on its own, we repeat the same format, but in parenthesis. For example, we're suggesting Tuesday (Jul 30) at 9am PDT, but it also needs to be converted for MDT and EDT. We would write it: Tuesday (Jul 30) at 9am PDT (12pm EDT, 10am MDT)

This also includes mimicking verbiage from other templates when creating a custom reply. When following up on a message, the templates will automatically change the verbiage, so you should as well. If the previous message used “Following up”, you can use “Reaching out” or “Circling back here”. The change in language alerts the reader that you’ve followed up again.

Apologizing

At times, a customer or participant will share what they consider to be a Clara mistake. Before you share an apology that takes ownership of a mistake that was mentioned by a customer or a participant, please thoroughly and carefully review the thread to determine if a mistake occurred. If you are unable to affirmatively determine if a mistake was committed, **please escalate.** Common reasons for apologizing include confirming a meeting for the wrong time, taking more than two hours to respond to a request, or not following explicit customer instructions.

When erroneously accused of making a scheduling mistake, Clara must politely present the facts to the customer to clarify. Clara does not apologize when an error did not occur or appropriate judgment was used.

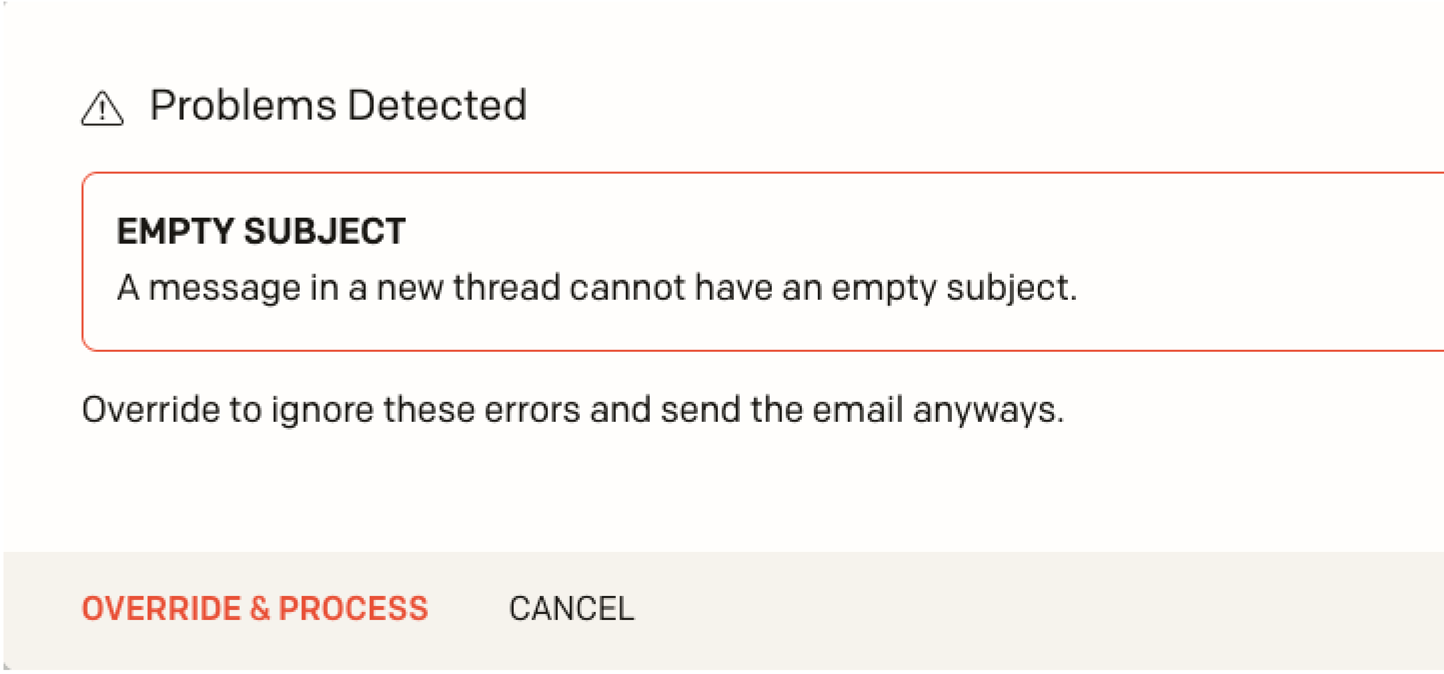
If it is determined that a mistake was made, here are examples of phrases to use in the apology.

- "Sorry for the confusion!"
- "Apologies for not following your preferences."
- "I'm sorry for the error!"

Internal communication

Internal communication happens between customer/Primary Attendee and Clara ***alone***. No participants are on cc.

If a customer loops us in to schedule without any participants included on the email, Exo will create a brand new email thread so our email to the participant doesn’t contain the email from the customer. In these instances, you will need to add a title to the email while on the Composer step. If Exo creates a new thread and you do not add the subject line, Exo will give you a notice at the end of the job that states the following. **Overriding this without adding the subject is a mistake.**



1. Respond to the last email that the participant was looped into.
2. If there is no email the participant was looped into, add that participant to the Meeting Creator. Exo will automatically create a new thread to conceal internal communication. That email will not get split, but rather will be stacked onto the current job.
3. Input a subject heading for the new thread with the following format, dependent on meeting type.

   {Call or Meeting} with {Customer (Company)} (Example: "Call with Lynette (Clara Labs)")

Enter subject here...

TO × **Chris**

CC × Lynette

BCC × Lynette

Hi Chris,

Happy to help get a call on the calendar for yo
Lynette.

Can you talk on Friday (Mar 24) at 6:30pm EDT

Let me know the best number to reach you, an
add it to the invite.

Best,
Clara

Looping in Customer Support

Support should be looped in when a customer or participant asks Clara to take an action that is not in protocol or requires a change of preferences that are not available to be edited in their Dashboard. (If the participant asks, please loop the customer in to Support, not the participant.) Below are some of the most common reasons to escalate a request to Support. If a scenario is not listed below and you are unsure if the job can be handled or not, please escalate to Admin, so they can determine the correct procedure.

Use the "**Loop in Support to assist template**" template for instances below:

Leave a snooze on the job ONLY if there is scheduling that can be done.

- Customer or participant expressly requests to connect to Support.
- Customer asks about plans and pricing.
- Customer wants to change Clara's name.
- Customer requests an invoice / receipt or has questions about/wants to update their billing information.
- Customer asks about their billing and/or wants to update their billing information.
- Customer makes a referral or introduces someone that wants to try Clara.
- Customer wants to cancel, pause, suspend, or hold their account or shares that they are leaving their company.
- Customer wants to extend their trial.
- Customer wants to know how many requests they've "used up," or any other usage info.
- Clara's response time has been delayed and the customer asks why.
- Customer asks about using codewords.
- Customer asks about why an event was scheduled from Clara's calendar.
- Customer asks Clara to edit a calendar event that Clara did not create.
- Customer's request would require Clara to schedule more than three events with times already confirmed from the **same** job.
- Customer ask for custom verbiage for certain scenarios.

- Customer ask that Clara send conditional event confirmations and perhaps asks that Clara confirm tomorrow's meetings only, not the calls. *Note: If a customer asks us to send a confirmation for a specific event that we have scheduled, that is okay to do.*
- Customer asks for a meeting summary of a specific time range outside of our regular Monday automated summary.
- Customer asks for a custom signature with images.
- Customer asks for Clara to do something clearly outside of scheduling like recommending a movie, researching a location, like a restaurant or make reservations.
- Customer requests that Clara read or forward an attachment or proofread something. Attachments are a privacy and security risk and Support must be looped in. *(If the participant requests that you forward an attachment to the customer, ask them to send it directly to the customer.)*
- Customer asks that Clara provide a location-dependent reminder such as asking that Clara remind them of x the next time they are in x location.
- Customer requests calendar invites based on specific conditions, like asking that Bob be added to all invites for office meetings.
- Customer asks to change the "owner" or "organizer" of the calendar invites that Clara sends.
- Customer requests adding an email thread to the event description of the calendar invite.
- Customer requests personalized event titles.
- Customer asks Clara to add multiple holds to the calendar (Adding up to 3 events when the customer is the only attendee is okay).
- Customer asks Clara to always schedule over certain existing calendar blocks.
- Customer asks to set up rule or notification within calendar events, such as setting the meeting as free or busy.
- Customer asks that when a participant declines an invite, that Clara ask the customer first if they want to reschedule.
- Customer asks that Clara prioritize certain times when scheduling.
- Customer asks that Clara send emails only during specific times.
- Customer asks that Clara follow up more frequently than every business day, at a specific time or in a specific time frame ("follow up at 6pm", "follow up tomorrow morning"). We do support following up *after* a specific time ("follow up after 4pm")
- Customer asks that Clara not ask to schedule over conflicts in times customers themselves suggest.

- Customer asks that Clara have a custom duration of travel time for off-site meetings.
- Customer asks that Clara set up a maximum follow-up of more than 3.
- Customer asks that Clara fill out a form to RSVP an event.
- Customer asks that Clara set up a meeting with another email address registered under their own account. For example, Customer John has two email addresses, each with a blue-star customer icon: john@abc.com and john@xyz.com. If customer John emails from john@abc.com and asks Clara to set up a meeting with john@xyz.com, loop in Support. *Please note that it's okay to schedule when customers set up meetings with "themselves" provided that Exo does not recognize that "other person" as a customer.*
- Customer requests that Clara communicate via text, chat, Slack, etc...
- Customer requests Clara to schedule multiple events that must happen in a certain order ("sequential scheduling")
- Customer asks Clara to use a participant's Calendly link to confirm a time or schedule multiple events
- Customer requests time-dependent location preferences. For example: Clara, schedule Skype calls from 8-10am only." or "Clara, schedule Google Hangouts between 4pm and 6pm only."
- Customer asks Clara to set up conditional time preferences for in-person meetings that specify a location when other locations fall in the same meeting type category. For example: "Clara, schedule lunches at Tacolicious between 11am and 1pm only." or "Clara, schedule meetings at Starbucks from 3-5pm only."
- Customer asks Clara to generally never schedule on holidays.
- If Clara is asked to add a location and a link to an invite.
- Customer asks that Clara always cc or bcc them or someone else on all jobs whenever a particular participant is involved.
- Any conditional rule that is a specific request for that meeting, outside of scheduling (Example: Customer asks that Clara keeps a certain email address on CC/BCC for communication, but they are not participating in the meeting)
- Customer requests to change their default time zone.
- If Clara is requested to add a custom Description.
- If Clara is requested to add/update/remove "All Day Events".
- If Clara is asked to suggest times with no participants/external parties (Example: Multiple customers are CC'd and they want to know what their mutual availability is ("Clara what times do we have available together over the

next few weeks?"), Single customer asks us to provide their availability in a certain time frame ("What's my availability next week?"))
- If a customer asks Clara to use a scheduling link to provide their availability to external participants. (We should only be using their provided availability in Exo.)

If a Participant requests Clara to do any of the following on an initial or follow up request, loop the customer in to Support without asking if we can schedule first

Note: If a follow up request made for any of the following, **do not** split the request. Loop in Support on the job where the email was sent.

- If Clara is requested to schedule a new recurring meeting or reschedule an existing recurring meeting. **Please note that we do support rescheduling a single instance of a recurring meeting.**
- If in a single email Clara is requested to schedule multiple meetings without confirmed times

- If Clara is requested to schedule for nine or more participants.
- If Clara is asked to provide availability for multiple meetings to an external participant in one email

If customer loops in Support (Support@claralabs.com)

- If the email is addressed directly to Clara, respond to the customer while keeping Support on CC.
- If the email is addressed directly to Support, Support will respond.
- Continue any ongoing scheduling in the thread. If there's nothing else we can do, archive the thread. **Do not loop Support into any emails intended for participants alone.**

Scheduling recurring events

Customer request

"Clara, please set up a recurring lunch meeting with Joe and Anna every other week."

1. Loop in Support.

Participant request

"Clara, can I schedule a recurring lunch meeting with {{Customer}} every other week?"

1. Acknowledge the participant’s email using the “Acknowledge participant request” template.

2. Use the "Loop in Support" template to connect the customer with Support.

Common Templates and Scenarios

Strikeout Templates

What are Strikeout templates?

Strikeout templates are interactive templates that offer times to a participant. They allow the participant to click on an available time and have Exo automatically send a calendar invite.

If a customer has Strikeout templates enabled for their account, they will appear in the Composer Step. There are four Strikeout templates: *Suggest Strikeout, Suggest More Times Strikeout, Reschedule Strikeout, and Followup One Strikeout.* Use them accordingly.

If a customer’s account does not have Strikeout templates enabled, only regular (i.e. non-Strikeout) templates will appear in the Composer step. Use them accordingly.

When to use Strikeout templates

Use a Strikeout template when all of the following below apply. Otherwise, use a regular template.

- **There is only one participant (or coordinator) that Clara has to suggest times to.** If Clara is scheduling with multiple participants and if a Strikeout template is used, one participant might click on a time that works for them but not for the other(s), and Exo will automatically send everyone a calendar invite anyway.

- **All times suggested are within the customer’s PMTs.** If Clara suggests a time outside of PMTs (that the customer suggested or agreed to), and if a Strikeout template is used, the time will appear as unavailable to the participant.

- **All times suggested conflict with no other calendar events.** If Clara suggests a time that overlaps with another calendar event (that the customer allowed to be scheduled over), and if a Strikeout template is used, Exo won't allow the participant to click on that time.

- **All times suggested honor the customer's buffer preference.** If Clara suggests a time that conflicts with the customer's buffer preference, and if a Strikeout template is used, Exo won't allow the participant to click on that time. However, for jobs where the customer allows Clara to override their buffer preference, the Strikeout template can be used provided that the "Customer Suggested" button is clicked on in the Times Step.

- **All information required for the meeting is present or can be collected by the Strikeout template.** If the meeting's is **virtual** and the channel is available in the customer's preferences (Zoom, Google Meets, Teams, etc) or it will be a phone call.

When not to use the Strikeout template

!□

Specific Scenarios for the Regular template

Other than the above mentioned scenarios, there are a few times where you will need to use the regular template.

- **Scheduling an in-person meeting:** The Strikeout template cannot differentiate between regular ADE and "Travel" ADE, so a participant can pick any available time on the customer's calendar, despite the fact their calendar may indicate they are not in that location.
- **Customer suggested specific dates/times on initial request:** A customer asks to schedule within a specific time frame ("Tuesday between 3 and 4pm"), a specific date ("Thursday Aug 29") or only want us to offer a few specific times ("Monday at 10am or Thursday at 2pm").
- **Customer suggested time frames in the future**: A customer asks us to schedule in the future and it is clear they do not want to schedule **before** that requested time ("Please schedule next month", "Please schedule after the holidays", "We can meet up after next Tuesday.").
- **Rescheduling when a specific time frame is mentioned:** A customer or participant declines an event and asks us to reschedule within a specific time frame (next week, a specific date, etc).

- **If a customer mentions the meeting can be in-person or virtual:** A customer gives the participant multiple options on how to connect ("We can either meet at the office or over Zoom.").
- **Customization that is not provided:** A customer asks the participant to provide the link, we need to ask the customer for a link, a custom channel is needed, because it's not populating the information correctly, etc

Why is this important:
_The Strikeout template has a calendar feature (similiar to Calendly) in the template. The participant can click on it and schedule any available time on the customer's calendar.

Since the customer has already made it clear in their email that they want a specific time or time frame, we need to adhere to this request. Sending the regular template allows us to reasonably control what time the participant selects for the meeting or make adjustments to the invite, as requested.

Please note that the Strikeout template will also **remove all snoozes** from the thread (not just from the Suggest Times template._

Questions about what Clara is

Sometimes, participants will notice our efficient scheduling and templates and ask for more information (about our software, if we're human/a real assistant, etc.). While we are always excited to share more about our product, we need to be mindful of what the customer would like us to say.

When a participant asks about Clara on a customer's domain (@domain.com)

If a participant asks any question relating to our software or if we are a human and the Clara email address is on the customer's domain, we should *immediately defer to the customer*.

1. Send the participant the "Acknowledge Participant request" template.
2. Ask the customer how to proceed using the "Passing this along how to proceed" template to the customer.

When a participant asks about Clara on a Clara Labs domain (@claralabs.com)

1. If a participant asks what software we use or has any questions about our product, you can use the "Product Question Templates" below (Option 1). If they're still curious and want to become a Clara customer, you can loop in Support.

Product Question Templates

Below are various questions or scenarios that should be responded to using templates accessible only by clicking on "**Clara Product / Feature Question**" in the Composer step.

(1) Are you real? / Are you a robot? / Did a robot or human respond to this?
(2) Clara receives an email in a foreign language
(3) Clara, can you call me? / Clara, may I call you?
(4) Clara, please click here to see my schedule. (Note: Clara **does** support using Calendly and Calendly-type links to schedule. Only use this template if it requires a credit card or information we don't have access to)
(5) Clara, please click here to access my schedule via Doodle. Then please complete the form for this meeting. (**Note**: Clara **does not** support accessing Doodle to schedule.)

Resending Invites

Note: The system does not allow us to resend invites, but we can resend the details.

1. Confirm that the event is on the customer’s calendar for the correct time and is not double booked. If there is a conflict, please escalate up to Admin so we can check if it was present when the time was confirmed.

2. Use the "Resend event details" template.

If the participant doesn't want to meet and no invite has been sent

1. Reply to participant's email using the "Acknowledge information" template. If necessary, tweak the Exo-generated verbiage.

2. Forward the participant's email to the customer, regardless if they're aware or not, using the "Let customer know no action" template. Remove any snoozes if there are any.

If an invite has already been sent, see ["Participant doesn't want to meet and an invite has already been sent"]() in the Times Step.

Travel time

If we've been asked to confirm a time for an in-person meeting, but there is not a 30 minute buffer on each side of the meeting.

1. In the Composer Step, use the following verbiage to confirm with the customer:
    i. "Scheduling this for your suggested time may not afford you adequate travel time. Would you like me to confirm {{Date and Time}} or suggest new times?"

If Clara is treated unprofessionally

Examples: Derogatory comments, profanity, verbal abuse, disrespectful language from either customer or participant

Exo Name: Treated unprofessionally

If the customer and/or participant are deliberately making it difficult for Clara to schedule

Examples: Repeated instructions that are clearly meant to be confusing, asking to confirm dates in the past or other instructions that clearly can’t be done, generally being difficult

Exo Name: Difficulty scheduling

If a customer's account is inactive and they reach out, and the job can be associated with no other active customer

Exo Name: Inactive customer reaches out

If a participant reaches out for a meeting with a customer whose account is inactive (Asks Clara to schedule)

Exo Name: Participant reaches out for inactive customer

(**Note:** If the participant is only speaking directly to the inactive customer and isn't asking Clara to schedule the meeting, you can archive the request and send no template.)

Suggest more times template

This template allows you to suggest new times to the participants if the times already suggested do not work for them, or if the time Clara previously suggested no longer works for the customer.

Use the dropdown to reveal the pre-populated verbiages in Exo and pick which one suits context best:

- **Only requested more times** - "Happy to suggest new times!"
- **Gave broad time range (e.g., Saturday or Sunday)** - "Happy to accommodate your preference!"
- **Suggested one time (e.g., 1pm tomorrow)** - "So sorry! That time doesn't work for (customer)."
- **Suggested multiple times (e.g., 1 or 2pm tomorrow)** - "So sorry! Those times don't work for (customer)."
- **Suggested narrow time range (e.g., Saturday afternoon)** - "So sorry! That doesn't work for (customer)."
- **They confirmed a time but it no longer works**. - "Sorry, but that time no longer works for (customer)."
- **Participant asks for same day** - “Unfortunately, nothing else today works.”

Following up with customers

Following up about approved meetings

- If Clara has a scheduling-related question that customers need to answer before Clara can move forward (e.g., scheduling outside of time preferences, or a high-level change that requires permission from the customer [link to https://clara-labs.readme.io/docs/channel-details-flow#changes-to-a-meeting-that-still-require-customer-approval]), follow up with them according to their follow-up frequency until their max follow-up preference is reached using the ‘Passing this along how to proceed’ template. You can edit the word “proceed” to “respond” if it makes sense with the previous context.

- If max follow up is reached, determine if the information is blocking scheduling. If it isn't, please continue schedule from where the last follow up left off. If it is critical and we cannot proceed without it, send the "Max follow up reached" template to the customer and archive the request.

Following up with participants

If a job reopens due to a snooze expiring, Worker Bee will usually appear and suggest which followup applies best. If Worker Bee is correct, proceed with their template.

Note: If **re-suggesting previous times**, make sure they're still available within availability and preferences by checking each time in the Times step. Not doing so is a mistake.

Our first email to a participant where we suggest times is the original. After that, follow-ups start.

Original: Typically this is the "Happy to help get a call/meeting on the calendar for..." email.

- **Followup 1**: Times should be suggested on the Times step when it is a followup
- **Followup 2**: Times should be suggested on the Times step when it is a followup with the strikeout template
- **Followup 3**: Times should be suggested on the Times step when it is a followup with the strikeout template
- **Notify Customer for Nonresponse**: Exo will generate verbiage stating that scheduling has been unsuccessful.

Special Considerations:

- While Followup 2 and Followup 3 will suggest times with the strikeout templates, it will only ask the participant if they have availability on non-strikeout templates.
- Clara does not send follow-ups on weekends (non-business days) by default. Note: If we are asked to do so, we can. This may also mean Exo sets a followup if it is in 24 hours advance of a meeting with missing details.
- Exo offers only four options when following up with participants (1, 2, 3 or over max #), dependent on a customer's preferences. If a customer asks you to

keep following up, cycle back in order. **Note**: We don't support following up more than 3 times as a preference.

- When a participant responds, the follow-up cycle resets. Note that an autoresponder [e.g. an automatic out-of-office (OOO) response] does not reset the cycle.
- When Clara has already maxed on follow-ups (as per the customer's usual follow-up preferences), and then the customer asks Clara to continue following up, the follow-up count resets.

Exceptions to preferred follow-up frequencies

These are the times Clara may follow up sooner or later than a customer's follow-up frequency preference.

1. When customer requests:

1. Use the "Acknowledge information" template and set snooze as needed.

2. When participant requests:

1. Use the "Acknowledge information" template and set snooze as needed.
2. Use the "Passing this along" template to give the customer a heads up.

3. When Clara receives participant's auto response saying they are OOO, have limited access to emails, etc:

For meetings with **ONE** participant:

1. If the participant's return date is later than when Clara would normally follow up, snooze the job for that date
2. Use the "**Participant out of office**" template to give the customer a heads-up.

It is your responsibility to ensure that the snooze (if any) for the entire job is correct. That may mean that the snooze of emails that no longer require it need to be manually turned off. Make sure to pay attention to the alert when you submit a job for processing. The number of days on the pop up should match your new snooze.

Asking a customer or participant to clarify a typo

Sometimes a customer or participant will respond with a date or time that doesn't make sense with the context of the meeting. We need to follow up and clarify what they mean.

1. Incorrect date:
    i. Email: "Tuesday (1/7) works" - Jan 2 is not a Monday
        a. Verbiage: "To clarify, do you mean *{{Day of the week (Abbreviation of Month and Date) at Time (am/pm) (Time zone)}}* or *{{Day of the week (Abbreviation of Month and Date) at Time (am/pm) (Time zone)}}*?"
        b. Example: "To clarify, do you mean Tuesday (Jan 7) or Wednesday (Jan 8)?"
2. Incorrect time:
    i. Email: "I can do 2am" - Scheduling a coffee meeting at 2am doesn't make sense in the context of the email
        a. Verbiage: "To clarify, would you like me to suggest *{{Day of the week (Abbreviation of Month and Date) at Time (am/pm) (Time zone)}}*?"
        b. Example:"To clarify, would you like me to suggest Tuesday (Jan 7) at 2pm EDT?"

Review

Suggest Edits

The **Review** screen shows a summary of all your work, including things you either changed during your job session, or unchanged from the previous CRA's job session. This is a great place to double-check that you processed the job as you intended. If you spot an error, go back to the corresponding Exo step to fix it.

Examples of what you may see depending on what you have entered in to Exo

Review Your Work

PARTICIPANTS

Dustin Dobbs

- Added Dustin Dobbs
- Set contact to Dustin Dobbs
- Set name to Dustin Dobbs
- Set coordinator to Dustin Dobbs

Robert Plant

- Added Robert Plant
- Set contact to Robert Plant
- Set name to Robert Plant
- Set timezone to America/Los_Angeles
- Set coordinator to Clara
- Set primary attendee to yes

Meeting Type

- Changed meeting type from OTHER to MEETING

CHANNEL

Duration

- Set duration to 1 hr

You can click the blue bubble next to “Only Show Changes” to view how the job was set up by previous CRAs.

TIMES

- Added Tuesday, 13th December, 2022 (PST) - 12:00 — 1:00 PM (60 minutes)
- Added Wednesday, 14th December, 2022 (PST) - 12:00 — 1:00 PM (60 minutes)
- Added Thursday, 15th December, 2022 (PST) - 5:00 — 7:00 PM (Range)
- Added Friday, 16th December, 2022 (PST) - 5:00 — 7:00 PM (Range)
- Added Wednesday, 14th December, 2022 (PST) - 4:00 — 5:00 PM (60 minutes)

EVENT

- Set title to Drinks: Dustin <> Robert (Clara Labs)
- Set location to 1958 Union St, San Francisco, CA 94123, USA (Herbal Bar at Redn

COMPOSER

TO **Dustin Dobbs** dustindobalot@gmail.com

CC

BCC Robert Plant clarafakecustomer1@gmail.com

Hi Dustin,

Happy to help get this meeting scheduled for you and Robert.

Here are a few times that work. You can click on them to confirm, or let me know if none of them work:

- Tuesday (Dec 13) at 12:00pm PST
- Wednesday (Dec 14) at 12:00pm PST
- Wednesday (Dec 14) at 4:00pm PST

The two screenshots above show that an in-person meeting is being set up between Dustin (participant) and Robert (customer).

Review Your Work

PARTICIPANTS

Dev

- Changed name from Devin Jarnigan to Dev
- Set phone to 567-012-3456

EVENT

- Changed title from Call: Devin <> Roger (Clara Labs) to Call: Dev <> Roger (Clara I
- Changed location from Roger to call Devin at TBD to Roger to call Dev at 567-012
- Added Confirmed event

DEC
15

Call: Dev <> Roger (Clara Labs)
Thursday, 15th December, 2022 (PST)
12:00 — 12:30 PM (30 minutes)

COMPOSER

TO **Dev** devjarg@gmail.com
CC
BCC Roger Waters clarafakecustomer2@gmail.com

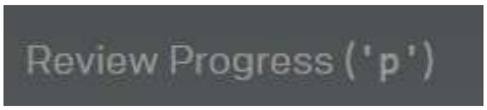
Perfect! I just sent out the event for you and Roger with the following details.

- Ad
- Se
- Se
- Se
- Se

The screenshot above shows that Clara is confirming a call for Dev (participant) and Roger (customer).

Shortcut to see your progress

If you want to see all the changes that you have made in Exo during your session before you reach the Review step, simply hit the "p" key on your keyboard or select the following option at the bottom of each step:



Doing so will show a review screen with all of your work so far.

Exo clock

You'll have eight minutes to complete a request once assigned unless you are an escalations CRA. Escalation CRAs are allowed 15 minutes to complete a request. You can see the remaining time on the bottom left of the request. Once that time expires, Exo will automatically unassign you from the job for inactivity and you will not be paid for that request. Please escalate when you are running out of time rather than let it expire.

Preferences

[Suggest Edits]()

Customers establish preferences when they begin using Clara. A customer's preferences refer to default guidelines about how to handle scheduling requests. These settings are chosen by the customer and can be updated at any time. This allows Clara to elegantly handle scheduling behind the scenes!

You'll see these preferences in various places in Exo.

! □

Some customers sign with a different name than what is reflected on their preferences. Always address the customer by the default name Exo provides.

Permissions

Customers can grant permission for participants to schedule with them without asking the customer first. Exo will check for you if the person requesting the meeting by adding the participants to the Participant step. It will prompt you to ask the customer for permission if they have not been pre-approved. However, there will be times in the middle of a job where you need to know if a person or domain is able to initiate and/or schedule meetings.

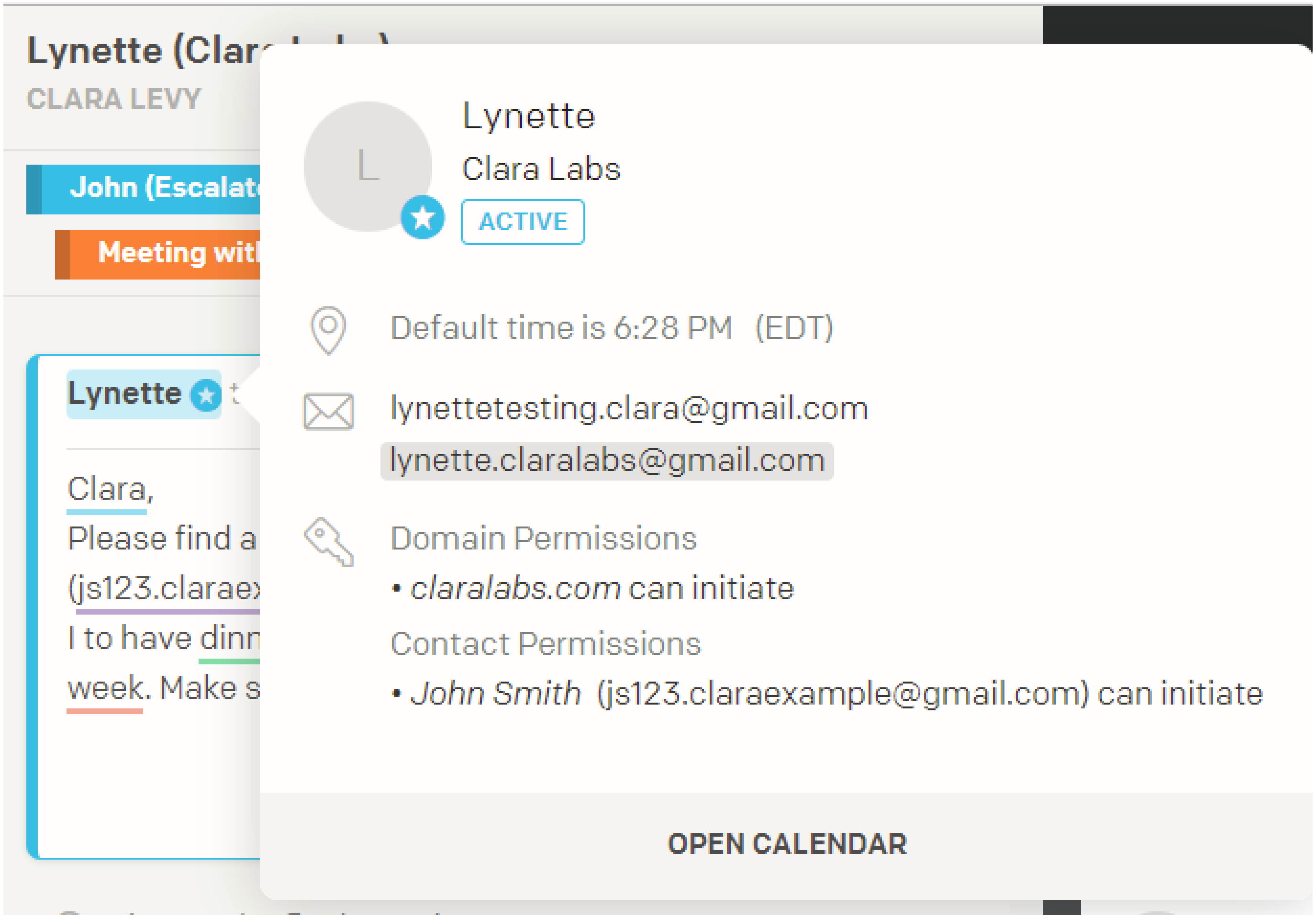
MEETING PERMISSIONS

- Those with schedule privileges can request to schedule and reschedule calls and meetings between the customer and themselves. They can also include other attendees so long as they themselves are attending as well. They cannot change the customer's preferences.

- Those with initiate privileges can request to schedule and reschedule calls and meetings between the customer and themselves. They can also request calls and meetings between the customer and other people even if they won't be attending themselves. They cannot change the customer's preferences.

- Domain permissions specify the email domains of all people who have either schedule or initiate privileges.

- Contact Permissions specify individual people who have either schedule or initiate privileges.

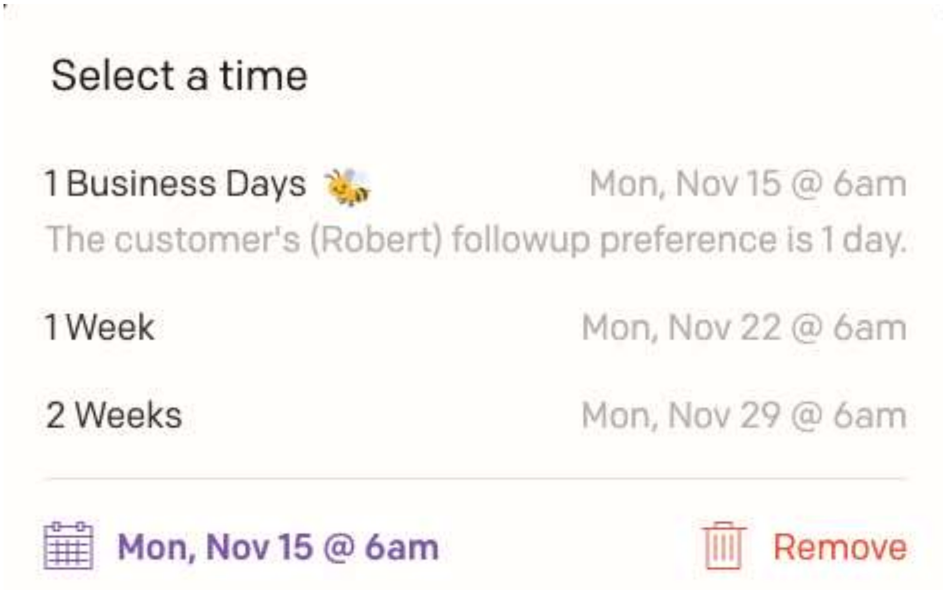


Everyone with an email ending in @claralabs.com can initiate. John Smith can initiate if that specific email address in parentheses is used.

If you're looking for...

A customer's follow-up frequency?

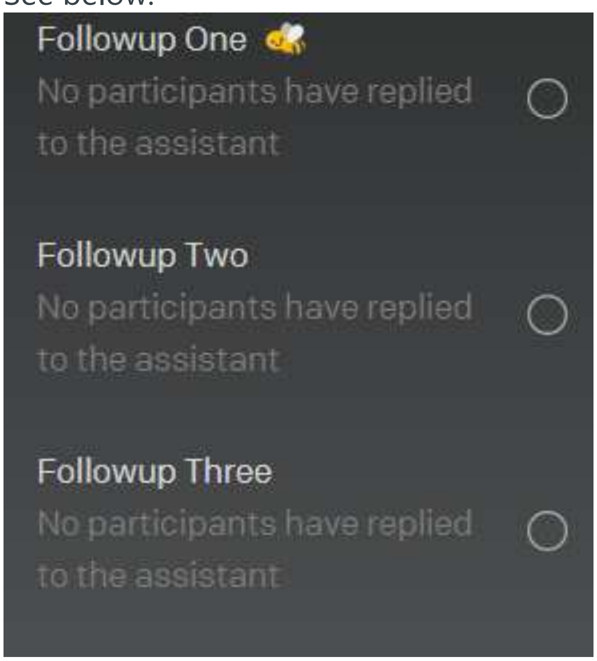
You can click on the snooze button at any time to be able to see this. The first option will always be the customer’s default. The "x" is the customer's follow-up frequency.



In this example, the follow-up frequency for this customer is 1 Business Day.

A customer's maximum number of follow-ups?

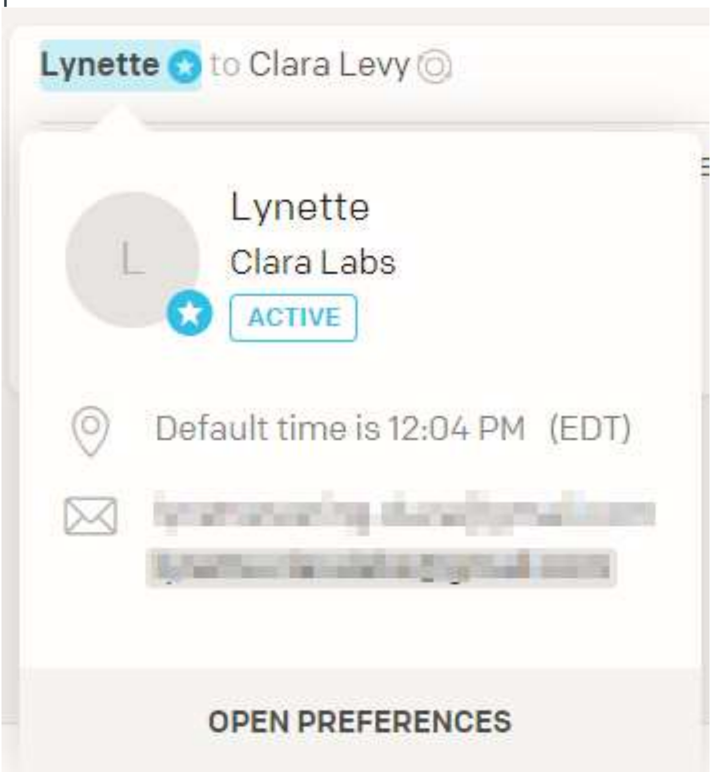
Customers can choose to have Clara follow up with a participant up to 3 times. On the Composer step, you'll see up to 3 follow-up templates depending on the customer's preference. If a customer only has 2, their preference is to follow up twice, and so on. See below.



In this example, our customer's maximum number of follow-ups is 3.

A customer's default time zone?

Click on the customer's name (next to blue star) and it'll show their default time zone in parenthesis.



In this example, the customer's default time zone is EDT.

Customer preference updates

Customers are now able to update certain preferences on their own via their own dashboard. If a customer requests one of the preferences listed below, or if they simply want to view their preferences, use the "**Customer wants dashboard preference change**" template.

For any other preferences not listed below or if you are uncertain, please make sure to escalate the request.

Reminders:

- If scheduling still needs to be done, make sure to do so.

- A snooze on the "Customer wants dashboard preference change" should be left ***only*** if the information needed is required for further scheduling. For example, you'll need to leave a snooze if we're asking for customer's group call preference.

List of preference updates a customer can make themselves.

Note: These are recurring preferences. For temporary changes, please see [Calendar Annotation Requests]

Scheduling & Availability preferences

- Conditional meeting type times (Any type, Breakfast only, Coffee only, Dinner only, Drinks only, In person only, Lunch only, Office only, Virtual only)
- Follow-up frequency
- Follow-up max
- Preferred meeting times (schedule here & do not schedule)

Virtual Meeting preferences

- Virtual buffer times
- Virtual meeting duration
- Who calls who
- Virtual channel preferences (+ can add: phone, Skype, conference line, Google Meet, Zoom, Microsoft Teams, Coderpad)
- Default virtual channel
- Event descriptions for virtual meetings

In-person Meeting preferences

- In-person buffer times
- In-person meeting duration
- In-person meeting locations
- Overall default location preference, as well as defaults for individual meeting types like breakfast
- Travel time events (on/off)

Advanced preferences

- Event titles (can decide whether to include or exclude last names and/or company names, and whether to preface event title with the meeting type like Office, Breakfast, Coffee, Call, Skype, Hangout, etc.)
- BCC settings
- CC settings
- Meeting reminders (on/off)
- Weekly summary (on/off)
- Adding conference rooms

Account preferences

- Calendars Clara takes into consideration when determining their availability
- Clara’s email address
- Email addresses that Clara recognizes as customer
- Update credit card information

!

List of preference updates Customer Support needs to be looped in for:

- Permanent time zone updates
- Customer wants to update their subscription plan or pricing
- Customer wants to customize Clara (Clara’s name, email, or signature)
- Customer asks to set up or has a question about codewords
- Customer wants to pause their account
- Customer wants to change the email that invite gets sent to
- Customer is confused about how to change their preferences