

AI ENABLEMENT · CHOOSING THE RIGHT TOOL

Choosing the Right Tool

(and why)

Judging the task, not the tool.

A 15-minute team intro

You probably didn't pick your tools

Most readers of this playbook had their tools chosen for them. An AI assistant rolled out across the company. A workflow tool you were told to adopt. Maybe both.

That's fine. The job is to recognise what each kind of tool is good at, so the one on your desk gets pointed at the right work.

This playbook is about that recognition.

The question that comes before the tool

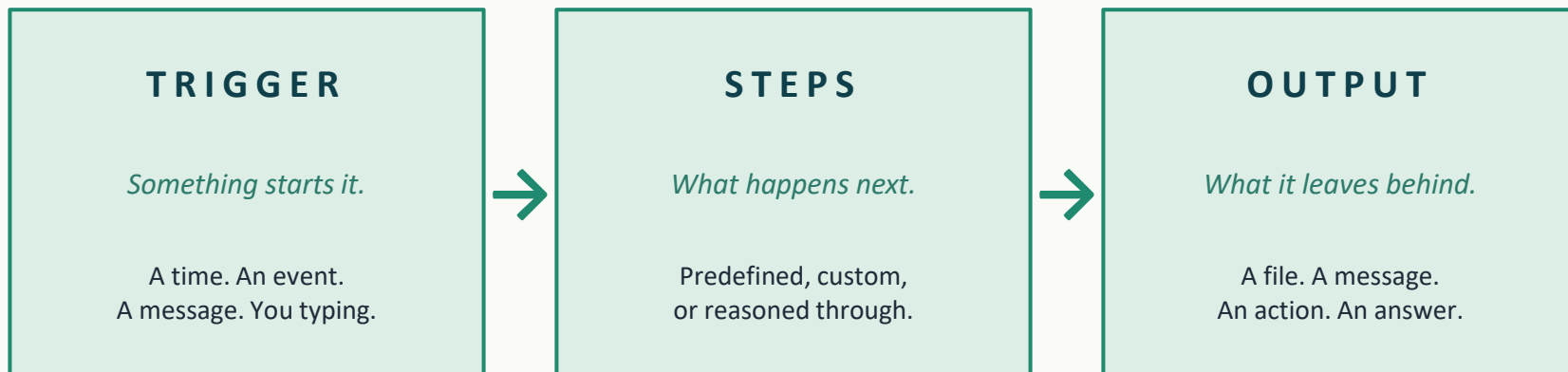
When something's taking too long, feels fiddly, or you dread it, the useful first question is “what kind of task is this?” Reaching for a tool comes after.

Judge the task, not the tool.

Get the task right, and the tool usually picks itself.

Every tool you'll meet has the same shape

Whether it's an email rule, a workflow, an LLM, or an agent, they all fit the same frame.



If you can describe the trigger and the steps, you can spot the tool.

Rules & Workflows

The reliable one.



TRIGGER

Email arrives. File uploaded. Form submitted. Time of day.

STEPS

Predefined. The same every time. Deterministic.

OUTPUT

Predictable. Repeatable.

GOOD AT

Routing, filing, notifications, copy-paste between systems, anything where the steps don't change.

BAD AT

Judgement, interpretation, anything fuzzy.

WATCH OUT FOR

A workflow only knows about the cases you designed it for.

If a temp could follow the instructions, this is your tool.

Scripts

The custom-built one.



TRIGGER

Scheduled run. Manual launch. A file appearing.

STEPS

Custom code. Can do almost anything.

OUTPUT

Whatever it's been coded to produce.

GOOD AT

Bespoke jobs the off-the-shelf tools can't quite handle. Data wrangling. Bulk operations.

BAD AT

Situations the code wasn't written for. Explaining itself.

WATCH OUT FOR

Someone has to maintain it when it breaks.

Powerful, but it owes its life to whoever wrote it.

LLMs

The fluent one.



TRIGGER

You type a prompt, or an automation passes text in.

STEPS

Generates a response based on patterns in language.

OUTPUT

Text that's fluent, plausible, sometimes wrong.

GOOD AT

Drafting, summarising, reformatting, brainstorming, explaining.

BAD AT

Facts, numbers, current events, precision.

WATCH OUT FOR

Confident bluffing. Fluent doesn't mean correct.

Brilliant junior assistant. Verify everything.

Agents

The autonomous one.



TRIGGER

A timer. An event. A spreadsheet update. A message arriving.

STEPS

The agent decides what to do next, often calling other tools or other agents.

OUTPUT

Depends on what it chose to do.

GOOD AT

Tasks where the steps can't be fully scripted in advance.

BAD AT

Anything you need guaranteed. Situations where mistakes compound.

WATCH OUT FOR

Probabilistic decisions stacked across steps. You may not have one available at work yet.

Think of it as an LLM let off the leash. Useful, but supervise.

One piece rarely solves the puzzle

Most real tasks need more than one kind of tool. Pulling figures out of an inbox, summarising them, and posting them to a channel needs a workflow and an LLM working together.

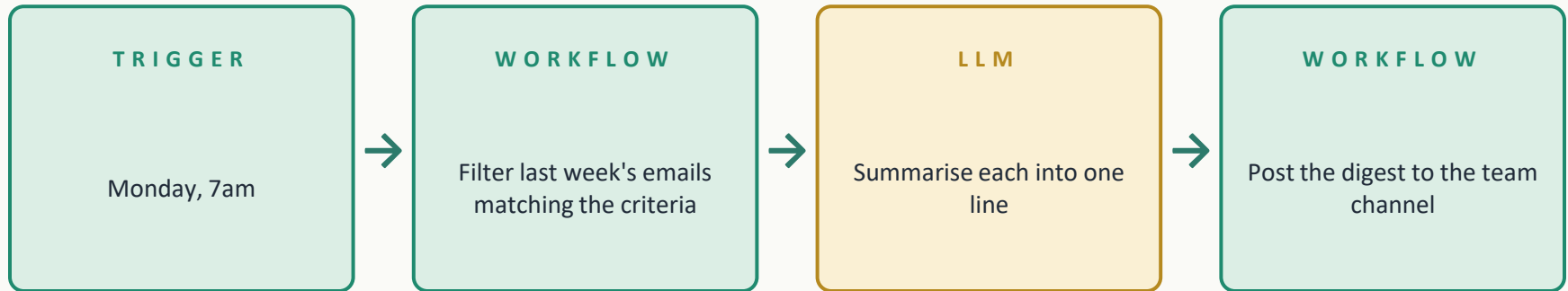
The skill is breaking the task into pieces and matching each piece to the tool that fits.



Small puzzles add up to bigger pictures.

Worked example: the inbox digest

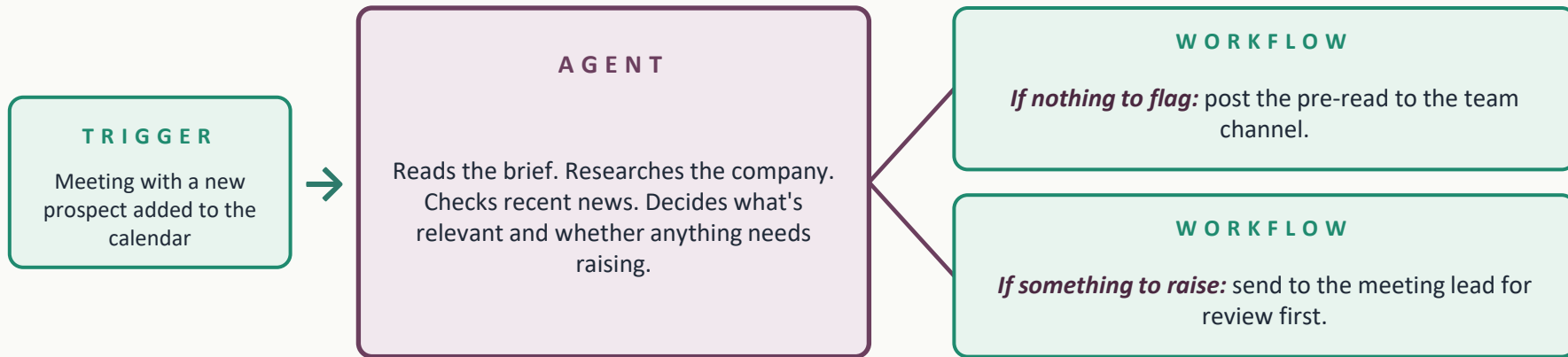
Task: Every Monday morning, summarise the relevant emails from last week into a one-line digest.



Three small pieces, doing a job nobody has to remember to do.

Worked example: the meeting prep

Task: Before a meeting with a new prospect, get a one-pager with company context, recent news, and a heads-up on anything worth knowing.



Agents earn their place when the next step depends on what they find.

Worked example: the summary

Task: Your manager needs a one-pager summary of a long strategy document before tomorrow morning.

TRIGGER

You, at 8pm, with the document in hand



LLM

Summary in the format you specify

No workflow needed. This isn't repeated work.

Sometimes the right answer is one piece. Don't over-engineer.

Not every task needs a tool

The first question is whether the task should exist at all. Before you build a workflow to automate the report nobody really reads, ask whether the report needs to be sent at all.

The smartest automation in the world can't beat deleting the step.

Streamline first. Automate what's left.

Ask the people who know the toolkit

Not every tool in this playbook is something you can pick up yourself. You probably can't spin up an agent or stand up a workflow platform on your own. Your organisation may already have the tools, or may be able to provide access. Your AI and automation team is the one to ask.

They're not there to gatekeep. They're there to tell you what's possible, what already exists, and what would take real work. A five-minute conversation can save you a fortnight of trying to build the wrong thing.

You don't have to know the whole toolkit. They do.

You don't have to assemble the whole puzzle

Start with one piece. Pick the most annoying task on your desk. Work out the trigger, the steps, the output. Match one tool to each step. See what happens.

Your permission slip: you don't need a strategy, a roadmap, or a transformation programme. One annoying task and one small experiment is enough.

One piece placed beats a perfect plan never built.

Recap

- 1 Judge the task, not the tool.
- 2 Every tool has the same shape: trigger, steps, output.
- 3 Match tool type to task type. Predictable tasks want predictable tools.
- 4 Real work is usually a combination of pieces.
- 5 If you don't have the tool you need, ask the team who does.
- 6 Start with one piece, not the whole puzzle.

Where to go next

The full playbook

Long-form reference with examples, watch-outs, and the glossary.

The quick reference

One-page summary for desks, onboarding packs, induction.

Companion playbooks

Start Here. Use-Case Adoption. Build & Develop. Governance & Safe Use.

Who to ask in your org

Your AI and automation team. IT or Digital. Information Governance / DPO.

Questions?

Discussion, examples from your team, things you're unsure about.