

Choosing the Right Tool

Quick Reference

One-page summary of Playbook 2. Print, pin up, hand out.

1. Judge the task, not the tool

Get the task right and the tool usually picks itself.

2. Every tool has the same shape

Trigger → Steps → Output. Whichever tool it is.

3. Real work is a combination

One piece rarely solves the puzzle. Match each piece to the tool that fits.

Read the task

Before reaching for a tool, describe the task in three parts:

Trigger — what starts it. A time, an event, a message, you typing.

Steps — what happens next. Fixed and predictable, or fuzzy and judgement-led.

Output — what it leaves behind. A file, a message, an action.

The four tools

Tool	Good at	Watch out for
Rules & Workflows	Routing, filing, notifications, repeatable copy-paste.	Only handles cases you designed for. Breaks silently if source changes.
Scripts	Bespoke jobs the off-the-shelf tools can't handle. Bulk data work.	Maintenance debt. Someone has to look after it when it breaks.
LLMs	Drafting, summarising, reformatting, brainstorming, explaining.	Confident bluffing. Verify everything. Not all LLMs are equal.
Agents	Tasks where the next step depends on what's found.	Probabilistic decisions stack. Supervise. Many "agents" are simpler than claimed.

Choosing within a category

LLMs vary. Some are tuned for code, some for writing, some for structured output. If the one rolled out doesn't fit, it may be the model, not the prompt.

Workflow tools vary. Power Automate, Zapier, n8n, Make all do similar jobs differently. Visual or code-heavy. Choose for the team's comfort, not the marketing.

Know where the data goes. Consumer AI and enterprise AI treat your data differently. Sensitive data stays on sanctioned tools.

Worked example shapes

The inbox digest — weekly summary of relevant emails

TRIGGER → WORKFLOW → LLM → WORKFLOW

The meeting prep — pre-read with branching outcome

TRIGGER → AGENT → WORKFLOW or WORKFLOW

The brief no one writes — one-off summary, late evening

TRIGGER → LLM

Different shapes for different tasks. The skill is matching pieces to the task, not picking the most impressive combination.

Verify before anything goes out

Three checks every time:

1. Does it actually answer what I asked?
2. Are facts, names, numbers, and references real?
3. Would I sign my name to this?

If the answer to any is unclear, the work isn't ready.

Who to ask

For...	Talk to...
Access to a tool I don't have	
"Is this tool approved for this data?"	
New use case ideas	
Reporting a problem with a tool	
Training and learning	

Fill in the right contacts for your organisation.

WATCH - OUTS

Don't reach for AI when a workflow, a rule, or just deleting the step would do.

Don't trust LLM output without reading it. The reviewer is you.

Sensitive data stays on sanctioned tools. Never paste customer or personal information into a free chatbot.

Don't expect an agent to be guaranteed. Probabilistic decisions stack. Supervise.