

AI and Automation Tools Guide

How to choose the right tool for your business.

Most leaders waste time chasing the wrong tool because they skip the work of naming the right problem. Use this guide to move from the problem, to the category, to the shortlist, to a tested choice.

FOUNDATION

Start Here, In Order

1

Know what problem you are actually solving.

Not what does AI do. What one workflow eats my week. The tool comes after the problem. Lead with the leverage point, not the demo.

TRY THIS: Name the single workflow that costs you the most time and produces the least joy. That is your starting target. Everything else is noise.

2

Pick a category, not just a brand.

AI is not one tool. It is five categories. Most leaders waste months comparing brands inside the wrong category. Pick the category that matches the problem, then shortlist within it.

TRY THIS: Pick one of the categories below that match the single workflow that you thought of from step 1. Chatbots are usually easiest to implement, but still require governance.

START HERE

Chatbots

IMPACT SecureAI, ChatGPT, Claude, Gemini, Copilot

QUICK WIN

Meeting

Otter, Fireflies, Read, Fathom

ALREADY PAID

Productivity

Microsoft Copilot, Google Workspace

ONE JOB, WELL

Specialized

Notion AI, Perplexity, Jasper

YOUR SECTOR

Industry

Medical scribes, legal research

THE VENDOR TEST

Four Questions a Leader Asks the Vendor

1

What leadership problem does this actually solve?

2

Who owns the change management when we introduce it?

3

What happens to trust if it goes wrong?

4

What does success look like in 30 days, and who is accountable?

EVALUATION

Eight Criteria to Evaluate Any Tool

1. Built for business, not consumers.

Enterprise tier with data controls, admin console, and audit logs. The free public version is not the same product.

2. Security built in.

Data Loss Prevention, access management, model that does not train on your inputs by default.

3. Compliant for your industry.

HIPAA Business Associate Agreement for healthcare. GLBA controls for finance. State AI act disclosures where required.

4. Integrations that matter.

Works with what you already pay for. Microsoft 365. Google Workspace. Your CRM. Your meeting platform. Not another silo.

5. Features that match your workflow.

Buy what fits how your team actually works today, not the longest feature list. Demo on your real data, not their canned scenario.

6. Training resources provided.

A vendor that gives you onboarding, prompt libraries, and a learning path. If the learning curve is on you alone, the tool is wrong.

7. Real partnership, not just a license.

Real implementation help. A team that knows your business by name and picks up when you call. A long term relationship, not just a recurring charge.

8. Be OK that a better one comes out tomorrow.

When you choose a tool, a new and better one will come out tomorrow. Choose anyway. Movement beats waiting.