

AI Software: What to Use, What to Avoid

A practical one-page field guide for choosing AI tools that actually earn their place in your business — and spotting the ones that won't.

WHAT TO USE

Pick the tool by the job, not the hype

■ General assistants

Claude · ChatGPT · Gemini

Everyday thinking, writing, summarising and research. The fastest productivity win — start here.

■ Meeting capture

Fireflies · Otter · Fathom

Turns every call into searchable notes and actions you can act on later.

■ Automation & glue

n8n · Zapier · Make

Connects your existing apps without code. Where most real ROI actually lives.

■ Bespoke / build

Claude API · custom builds

Custom agents built on an API when off-the-shelf can't fit your process.

BEFORE YOU COMMIT

The 5-point test for any AI workflow

- ✓ **Real job** — Does it solve a specific, named workflow you can point to today?
- ✓ **Data safety** — Are you clear on where your data goes, how long it's kept, and whether it trains their models?
- ✓ **Human control** — Can a person review and override before anything consequential happens?
- ✓ **Fits your stack** — Does it connect to the systems you already use?
- ✓ **Measurable** — Can you actually see whether it's saving time or money?

Two or more "no"s? Walk away — or talk to someone who'll build it right.

WHAT TO AVOID

Six red flags of AI snake-oil

 Thin API wrapper "AI" that's just a markup on a model you could call directly for a fraction of the price.	 Bolted-on "AI" A tired legacy product with an AI checkbox added for the brochure — no real capability.
 Data grab Wants all your data with vague retention terms, or trains its models on your content.	 No human in the loop Automates high-stakes output with no review step. Fine for drafts, dangerous for decisions.
 Black-box lock-in No export, no transparency, and a painful exit. Your data becomes their hostage.	 Magic everything Claims to do everything for everyone. Real tools are honest about their limits.

WHEN NOT TO USE AI

Five places to keep humans firmly in charge

- ✗ **Accountability calls** — Decisions that must be legally defensible or need a name attached to them.
- ✗ **High cost of being wrong** — Medical, legal or financial output where a confident-but-wrong answer causes real harm.
- ✗ **Genuine human empathy** — Sensitive conversations — grievances, bad news, care — where a person must be present.
- ✗ **No clean data** — If your underlying data is messy or missing, AI amplifies the mess. Fix the data first.
- ✗ **Low-volume, one-off tasks** — If it happens rarely, automating it can cost more than just doing it by hand.

THE SWEET SPOT

Where AI earns its place

AI pays off when a task is all three of these at once:

- ✓ **High-volume** — It happens a lot — so small savings per task add up fast.
- ✓ **Repetitive** — It follows a pattern a model can learn, not pure novel judgement.
- ✓ **Tolerant of review** — A human can sanity-check the output before it matters.

YOUR NEXT MOVE

Four steps to your first real AI win

- 1. Audit** your repetitive, high-volume workflows.
- 2. Pick one pilot** — narrow beats broad.
- 3. Start cheap** to prove the value.
- 4. Build vs buy** — once it works, decide off-the-shelf or bespoke.

READY TO PUT AI TO WORK?

Let's find your highest-ROI first step.

Book a free, no-obligation discovery workshop. We'll map your workflows, pinpoint where AI genuinely pays off, and tell you honestly if you don't need us.

Web digitalplanning.tech

Email hello@digitalplanning.tech