Tool Selection Worksheet

Pick the right CATEGORY of tool — decision tree + audition planner

The decision tree — ask of ONE workflow step

Is the core of the step WORDS?
drafting · summarizing · answering · organizing

→ **AI ASSISTANT**

Is it a specialized CRAFT?
images · video · voice · transcription

→ **SPECIALIZED TOOL**

Does work SIT BETWEEN APPS?
you are the copy-paste messenger

→ **AUTOMATION PLATFORM**

The four kinds of helpers

AI assistant	Thinks and drafts with you, one task at a time Start here — most beginner AI steps
Specialized tool	One craft, done excellently When the generalist is not good enough
Automation platform	Moves work between apps on your trigger When YOU are still the messenger
AI agent	Plans and executes multi-step goals Later — after review habits are automatic

The discipline

Category first, brand second. Shortlist of at most TWO. Audition on your real task.
Your ★ review gate stays — regardless of tool.

Tool Selection Worksheet

Your choice — one workflow step at a time

Workflow step: _____

BRANCH — words, craft, or plumbing? Why (one sentence):

_____

CATEGORY (not a brand):

_____

SHORTLIST OF TWO — audition on your real task

Option A: _____ **Option B:** _____

The audition test (real task + what "good enough" looks like):

_____

_____

STAYS MANUAL FOR NOW (including your ★ review gate — always):

_____

_____

FOMO defense: when a shiny new tool appears, ask "which category is this?" No waiting step in that category = close the tab. You have not fallen behind; the tool arrived before your need.

Tool Selection Worksheet

What to do with this document

Your next steps

- [ ] Run your circled workflow's AI step through the tree — write the category, not a brand
- [ ] Build the shortlist of two and define the audition test
- [ ] Audition happens in the next lesson ("Build Your First Automation") — no subscriptions tonight

Keep going (free)

Every lesson of the Automation Academy is free at braintrain-ai-academy.com/automation-academy — problems first, tools second. This worksheet feeds directly into the next lesson of Module 2.

A NOTE FOR LATER

Later in this academy, documents like this one become your Automation Blueprint — a written plan of everything you want built. You can build it yourself with what these lessons teach. And if you would ever like help designing it around your specific situation, BrainTrain AI Coach can guide you step-by-step. For now: run the worksheet. That is the whole assignment.