

Picking the Right AI Tool for the Job

Rule of thumb: general tools for thinking. Specialist tools for the same job, done the same way, every time.

THE JOB	REACH FOR	KEEP IN MIND
Drafting emails, quotes, listings	ChatGPT, Claude, or Gemini — pick one, learn it well	Verify names, numbers, and promises before sending.
Brainstorming and planning	Claude or ChatGPT — use voice mode as a thinking partner	Give it your real context first.
Summarizing documents and long threads	Claude for long documents; NotebookLM (free) when it's a pile of them	Attach the source; spot-check figures.
Images, flyers, social graphics	Canva for finished layouts; Ideogram when words must render correctly in the image	Purpose-built controls beat chat prompts for layout and brand colors.
Meetings, calls, site visits	Fathom (free) for video calls; Otter on your phone for in-person visits	Record with permission; talk becomes notes and action items.
Work inside email and documents	Microsoft 365 Copilot or Gemini in Google Workspace — the suite you already pay for	Drafts where you already work.
The same job, every week	Zapier with AI steps — or have it built and managed for you	A set-up process beats re-prompting. Where managed help earns its keep.

THREE QUICK TESTS BEFORE YOU RELY ON ANY TOOL

1) Can you verify the output yourself? 2) Would a mistake reach a customer? 3) Will you do this task again next week?

If a mistake would reach a customer, keep a person in the loop. If the task repeats weekly, it's worth setting up properly.

AI drafts. You approve. Your name stays on the work.

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