

 Suhas Bhairav

AI Model Selection Cheat Sheet

A practical, beginner-friendly guide to choosing AI tools for business tasks.

Decide the right AI tool for each task,
confidently and quickly.

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Why AI Model Selection Matters

The right tool saves time, reduces risk, and aligns AI work with business goals. Start with clear outcomes and constraints.

Key move Begin with a one-page decision map before tool shopping.

PRACTICAL CHECKLIST

01 Start with the task type and the desired outcome to guide tool choice.

02 Match tool category to task complexity and governance needs.

03 Consider data sensitivity, privacy, and regulatory constraints.

04 Pilot on a small task before large-scale rollout.

05 Involve stakeholders from product, marketing, and IT early.

06 Budget, vendor support, and integration readiness should guide selection.

07 Plan for integration with existing systems and data flows.

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Common AI Tasks by Tool Type

This page helps non-technical leaders map business tasks to practical AI tool categories.

Key move Test a real task end-to-end before large-scale rollout.

PRACTICAL CHECKLIST

- 01** Writing and editing: apply language models for drafts, editing, and tone control.
- 02** Research: use browsing-enabled tools for summaries and source gathering.
- 03** Strategy: run scenario planning and option comparisons with AI assistance.
- 04** Document analysis: extract key points and summarize multi-page PDFs or reports.
- 05** Coding: leverage coding assistants for scaffolding, templates, and refactoring.
- 06** Data analysis: connect datasets to AI tools for quick insights and visuals.
- 07** Customer support: deploy chatbots with escalation to humans when needed.

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Tool Categories at a Glance

A practical taxonomy of AI tools used in business, focused on decision clarity.

Key move Map your data flow before tool choice.

PRACTICAL CHECKLIST

- 01** Chat models (ChatGPT, Claude, Gemini): natural language drafting, Q&A, and creative writing.
- 02** Code assistants (Copilot, code LLMs): autocomplete, templates, and debugging.
- 03** Retrieval and analytics (Perplexity, similar tools): facts, briefs, and knowledge queries.
- 04** Image and multimodal tools: generate visuals; create prompts for marketing and design.
- 05** Automation and workflow tools: connect apps and automate repetitive tasks.
- 06** Local models and private hosting: on-premises AI for sensitive data.
- 07** Data tools and dashboards: AI-assisted insights from tables and BI.

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Decision Table: When to Use What

A simple guide to choosing tools, with do/don'ts and pitfalls.

Key move Fill this table for your mission-critical tasks.

PRACTICAL CHECKLIST

- 01** Drafting/editing: Use chat models for drafts; verify facts; don't rely on style alone.
- 02** Research: Use browsing-enabled tools; fact-check with sources; avoid unsourced claims.
- 03** Strategy: Use scenario analysis; compare options; avoid opaque assumptions.
- 04** Document analysis: Extract key points; summarize; verify extraction accuracy.
- 05** Coding: Use copilots for scaffolding and templates; review results.
- 06** Data analysis: Connect data sources; run basic models; beware biased outputs.
- 07** Automation: Use for repetitive tasks; validate end-to-end; monitor failures.

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From Tool to Action: Building Agentic Workflows

Learn how to chain tools into repeatable workflows that deliver outcomes.

Key move Prototype with a single end-to-end task.

PRACTICAL CHECKLIST

- 01** Define the business outcome and success metric for the workflow.
- 02** Map data flow: inputs, transformations, and outputs across tools.
- 03** Choose a primary AI agent as the decision-maker for the task.
- 04** Add supporting tools for search, analysis, and automation as needed.
- 05** Incorporate human-in-the-loop at critical decision points and reviews.
- 06** Implement logging and monitoring to track performance and reliability.
- 07** Iterate with small experiments to learn quickly and improve.

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9 Real-World Scenarios and Steps

Guidance for executing tasks with AI across common business domains.

Key move Test each scenario on real data before committing.

PRACTICAL CHECKLIST

- 01** Writing/editing: draft memos, reports, and emails; refine tone and clarity.
- 02** Research: collect market data, summarize sources, and create briefs.
- 03** Strategy: run scenario analyses, stress tests, and option comparisons.
- 04** Document analysis: extract actions, risks, and decisions from reports.
- 05** Coding: generate templates, scaffolds, and refactor guidance.
- 06** Data analysis: pull KPIs, run quick analyses, and visualize results.
- 07** Customer support: craft responses; route complex queries to humans.

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Internal Knowledge Search and Automation

Techniques to enable fast knowledge access and repeatable processes.

Key move Start with a private data source and a single workflow.

PRACTICAL CHECKLIST

- 01** Internal knowledge search: index documents; set access controls and privacy rules.
- 02** Workflow automation: connect apps; configure triggers; monitor end-to-end flow.
- 03** Knowledge sharing: publish AI-generated notes to teams and docs.
- 04** Governance: define policies; review results; ensure compliance.
- 05** Security: protect sensitive data; maintain audit trails.

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2-Week Pilot and Setup

A practical plan to start small, measure ROI, and scale thoughtfully.

Key move Start with a single, well-scoped pilot.

PRACTICAL CHECKLIST

- 01** Week 1: select one use case; pick primary tool; define success metrics.
- 02** Week 1: gather data access; establish governance; configure security controls.
- 03** Week 2: run end-to-end test; collect results and feedback.
- 04** Week 2: iterate prompts; tune workflows; address bottlenecks.
- 05** Post-pilot: decide on scale; plan training and rollout.
- 06** Common mistakes: rushing integration; ignoring data privacy and bias.

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Closing: Practical Path Forward

A concise plan to continue learning, experimenting, and scaling AI in your business.

Key move Schedule a 90-minute strategy session to tailor this to you.

PRACTICAL CHECKLIST

- 01** Create a living AI tool landscape for your company.
- 02** Set quarterly reviews of AI tool performance.
- 03** Develop a lightweight governance policy and guidelines.
- 04** Invest in staff training on prompts and workflows.
- 05** Track ROI with a simple, repeatable dashboard.

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