DAILYFEEDNOW / FREE PRACTICAL GUIDE

Chatbot or AI Agent?

A checklist to choose the right approach for your task.

1. DEFINE THE JOB

- [ ] **I need an answer, draft, explanation, or brainstorm.**
  Start with a chatbot; check whether its available tools meet your needs.
- [ ] **I need actions completed across several steps or apps.**
  Consider an agent with the right integrations and approval controls.
- [ ] **I have written a clear outcome and success criteria.**
  Example: Compare three options, cite sources, and return a short table.

2. CHECK ACCESS AND CONTROL

- [ ] **I know which tools, files, and accounts the task requires.**
  Check the actual product capabilities; labels alone do not tell you enough.
- [ ] **I have limited access to only what this task needs.**
  Remove unnecessary personal data and avoid sharing passwords.
- [ ] **I have decided which actions need my approval.**
  Review purchases, messages, publishing, and file deletion before execution.

3. TEST BEFORE RELYING ON IT

- [ ] **I will try a small, reversible task first.**
  Record the prompt, tool/model, date, result, and any manual help needed.
- [ ] **I will verify important claims and inspect completed work.**
  Open cited sources; check dates, calculations, and the actual final output.
- [ ] **I have checked cost, limits, and a way to stop the task.**
  Choose the simplest setup that meets your needs; keep a manual fallback.

MY DECISION

Chatbot / Agent / Combination: _____

What I must review: _____

Capabilities overlap. This is a decision aid, not a product benchmark.

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