

AI Tools Cheat Sheet

The tools that actually work, organized by function. Updated March 2026.

This is not a comprehensive list. It is the short list. These are the tools worth testing first, organized by the business function they replace or augment. Start with one per function. Test for 30 days. Measure output, not activity.

THINKING & STRATEGY

For analysis, decision-making, writing, and any task where you need a thought partner.

Claude (Anthropic)	Best for long-form analysis, strategy docs, nuanced reasoning, and working with large documents. Use Projects for persistent context.
ChatGPT (OpenAI)	Strong all-rounder. Good for brainstorming, drafting, and quick research. Use custom GPTs for repeatable workflows.
Gemini (Google)	Best when you need deep integration with Google Workspace. Good for summarizing across Gmail, Docs, and Drive.

CUSTOMER SUPPORT

AI should handle 70%+ of support volume. Humans handle escalations only.

Intercom Fin	AI agent that resolves tickets from your knowledge base. Integrates with existing Intercom setup.
Zendesk AI	Built-in AI for Zendesk users. Auto-triage, suggested replies, and resolution bots.
Custom chatbot (Claude/OpenAI API)	Build your own if you need full control. Feed it your docs and support history. Best for complex products.

FINANCE & LEGAL

Contract review, financial analysis, invoice processing, compliance checks.

Claude	Upload contracts and financial docs directly. Strong at identifying risk clauses, summarizing terms, and financial modeling.
Spellbook	AI contract drafting and review purpose-built for legal. Suggests clauses, flags risks.
Ramp / Brex AI	AI-powered expense management. Auto-categorization, anomaly detection, spend insights.

MARKETING & CONTENT

Drafting, repurposing, SEO, social. AI handles first drafts. Humans edit and approve.

Claude / ChatGPT	First drafts of everything: newsletters, blog posts, social, ad copy. Claude for longer, nuanced content. ChatGPT for quick turns.
Midjourney / DALL-E	Image generation for social, presentations, and marketing assets. Midjourney for quality, DALL-E for speed.
Descript	Video and podcast editing with AI. Transcription, clip generation, filler word removal.

SALES

Research, outreach, follow-ups, CRM hygiene, call analysis.

Clay	AI-powered lead enrichment and outreach. Builds prospect lists, writes personalized emails at scale.
Gong / Chorus	AI call analysis. Identifies what top reps do differently. Auto-generates follow-up notes.
Apollo.io	Prospecting + AI email sequences. Good for outbound-heavy teams.

DATA & DASHBOARDS

The morning dashboard. AI synthesizes all metrics so decisions happen by 6am.

Claude Projects / ChatGPT	Upload CSVs, connect to data. Ask questions in plain English. Best for ad hoc analysis.
Hex / Mode	AI-powered analytics notebooks. Write SQL in natural language. Auto-generate visualizations.
Notion AI + Zapier	Knowledge base + automation. Notion stores context, Zapier connects systems, AI fills the gaps.

PRODUCT & ENGINEERING

PRDs, acceptance criteria, code review, bug triage, documentation.

Claude Code / Cursor / GitHub Copilot	AI coding assistants. Claude Code for agentic tasks. Cursor for IDE integration. Copilot for inline suggestions.
Linear + AI	Project management with AI triage. Auto-labels, prioritizes, and suggests assignments.
Claude / ChatGPT	PRDs, user stories, acceptance criteria, competitive analysis. Feed it context, get structured output.

The rule: Do not adopt more than one new tool per function at a time. Test for 30 days. Measure output, not opinions. If it does not measurably improve speed, quality, or cost, kill it and try the next one.