

Agent or *automation?*

Run one real task through this before you build anything.

STEP 0

Pick one real example

An actual email, form or request from last week. Not the general idea of the task.

My task:

My real example:

INSIDE

- 1 The one question
- 2 Automation signs
- 3 Agent signs
- 4 Try the middle first
- 5 Cost and failure check
- 6 The ladder, a worksheet and a BRIEF prompt

— STEP 1

The one *question*

ASK ABOUT YOUR REAL EXAMPLE

- ☐ Can I write a rule that decides what happens next?
- ☐ Would that rule be right every time?

Both yes: build an automation. Either no: keep going.

Source: Averolt, dev.to, Oct 5, 2026

— STEP 2

Automation *signs*

TICK WHAT IS TRUE

- ☐ The steps never change
- ☐ The input looks the same every time (clean, structured)
- ☐ The result must match on every run
- ☐ Speed and consistency matter more than judgment

Sources: Averolt; Make, make.com/blog/when-to-use-ai-agents



— STEP 3

Agent *signs*

TICK WHAT IS TRUE

- ☐ Something has to be read and understood first (emails, documents, messages)
- ☐ Inputs vary widely
- ☐ You can't map every path or predict the number of steps
- ☐ A person would have to improvise

Sources: Make, make.com/blog/when-to-use-ai-agents; Anthropic, anthropic.com/engineering/building-effective-agents

— STEP 4

Try the *middle* first

AN AI WORKFLOW

- ☐ Can the steps stay fixed while AI does one job inside one step (read, label, extract, summarize)?

Example: email arrives, AI labels it, a rule routes it to the right team.

Source: Make, make.com/blog/when-to-use-ai-agents



Cost and *failure* check

AUTOMATION

Almost nothing per run

Fails loudly. When something changes, it stops.

AGENT

A charge per request

Moves with volume, model and document size. Can fail quietly by producing something plausible.

IF IT IS AN AGENT

- ☐ Who checks the output, and how?
- ☐ Does a person approve before money moves, a record changes or a customer is told something?

Sources: Averolt; Anthropic, anthropic.com/engineering/building-effective-agents

Start low, move *up*

LEVEL 1

Automation

If X happens, do Y.

LEVEL 2

AI workflow

AI does one step, rules run the flow.

LEVEL 3

Agent

AI decides what to do next.

RULE OF THUMB

Start at level 1. Move up only when the level below fails on your task. The strongest systems mix all three.

ANTHROPIC

"We recommend finding the simplest solution possible, and only increasing complexity when needed."

Sources: Make, make.com/blog/when-to-use-ai-agents; Anthropic, anthropic.com/engineering/building-effective-agents



FILL THIS IN

TASK	RULE POSSIBLE?	LEVEL	WHO CHECKS IT
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Ask AI to *decide* with you

COPY, FILL THE BRACKETS, PASTE

- B Background:** I run [business] and want to automate [task].
Here is one real example: [paste].
- R Role:** Act as an automation consultant who prefers the simplest solution.
- I Instructions:** Tell me whether this needs a plain automation, an AI workflow or an agent, using the one-question test. Name the one step that needs AI, if any.
- E Examples:** Form submitted, row added, email sent is an automation. Email arrives, AI labels it, rule routes it is an AI workflow.
- F Final output:** A one-line verdict, then the steps as a numbered list with each step tagged RULE or AI.

Ask me any questions you need answered before you start.

SOURCES

Anthropic, Building effective agents:
anthropic.com/engineering/building-effective-agents

Make, When to use AI agents: make.com/blog/when-to-use-ai-agents

Averolt, AI agent or automation: which does your task need?
dev.to/averolt/ai-agent-or-automation-which-does-your-task-need-3lm



— BEFORE YOU BUILD

Your *verdict*

MY TASK

CIRCLE ONE

- ☐ Level 1: automation
- ☐ Level 2: AI workflow
- ☐ Level 3: agent

THE ONE STEP THAT NEEDS AI, IF ANY

WHO CHECKS IT, AND HOW

Where to find *me*

SKOOL COMMUNITY

**Join the Momentum AI community on Skool
(7-day free trial):**

<https://www.skool.com/momentum-ai/about>

Step-by-step AI systems and real builds you can follow.

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