

My Favorite AI Tools: Companion Workbook

A practical, fill-in-the-blanks guide to turning the AI tools webinar into real time savings in your aging-in-place business.

This workbook accompanies the AIPD webinar “My Favorite AI Tools (and What They Actually Do).” Its purpose is simple: help you decide which of these tools is actually worth your time, and commit to one concrete next step.

A note before you start

Fill this out at your own pace — on screen or printed. There are no wrong answers, only the tools and tasks that fit YOUR practice.

GETTING STARTED

How to Use This Workbook

This workbook follows the same order as the webinar: writing, research, design, presentations, video, and scheduling. Work through it section by section, or jump straight to whichever tool category matches your biggest time drain.

Each section gives you a short recap of what the tool does, followed by a space to apply it to your own business. You don't need to try every tool — the goal is to leave with ONE tool you'll actually start using this week.

Type directly into the shaded fields if you're filling this out digitally, or print it and write by hand. Either way, the Action Plan page near the end is where it all comes together.

Working through this on your own?

Prefer a guided walkthrough? Esther offers short 1:1 consultations to help you apply this workbook to your specific business — details on the closing page if you'd like that extra support.

SELF-ASSESSMENT

Where Is Your Time Actually Going?

Before picking a tool, it helps to know where your time really goes. Rate how much time each task currently takes out of your week (1 = barely any time, 5 = hours every week) — this will point you toward the section of this workbook worth focusing on first.

Writing — emails, proposals, blog posts, newsletters, client communication

1 2 3 4 5

Research — looking things up, comparing products, finding current information

1 2 3 4 5

Graphic design — social posts, flyers, thumbnails, branded images

1 2 3 4 5

Building presentations — webinars, client education, training decks

1 2 3 4 5

Video or audio editing — recording, captioning, trimming, podcasts

1 2 3 4 5

Social media scheduling — posting consistently across platforms

1 2 3 4 5

Your biggest time drain right now:

If you got back 5 hours a week, what would you do with it?

TOOL FOCUS

Writing & Long-Form Work

Claude is suited to longer documents — lengthy articles, large PDFs, or anything that needs thoughtful editing. ChatGPT works more like a conversation: good for blog articles, newsletters, scripts, brainstorming, checklists, social posts, and quick emails. Using both isn't redundant — each one brings something different, like getting a second opinion.

Which writing tasks eat the most of your time?

Client emails and follow-ups

Proposals or quotes

Blog posts or newsletters

Social media captions

Training or onboarding materials

Something else

The webinar's tip

Rarely use the first answer. Keep talking to it: “Can you make this shorter?” “Can you make it friendlier?” That back-and-forth is where the better draft comes from.

Pick one piece of writing you do every week. Draft it with Claude or ChatGPT this week — what did you ask for first?

What follow-up prompt did you use to make it better?

Research — Perplexity & NotebookLM

Perplexity is for researching the open web — it shows its sources, which makes it especially useful for current events, medical topics, statistics, and comparing products. Instead of opening fifteen browser tabs, you get an organized summary with sources included.

NotebookLM works differently: instead of asking about the internet, you upload your own material — PDFs, training manuals, articles, research papers — and it learns that material. You can ask questions, get summaries, and even generate a podcast-style discussion from your own documents.

What's a research task you repeat for nearly every client or project?

What document(s) of yours could NotebookLM learn from (a training manual, past reports, a reference guide)?

Where could research time be cut this month?

Comparing products or equipment for a client
Summarizing a long PDF or report

Checking current codes, statistics, or
guidelines

Answering questions from my own training
materials

TOOL FOCUS

Design & Graphics

Three tools cover most graphics needs. Canva AI handles full design work — social graphics, presentations, infographics, thumbnails — plus AI image generation and Magic Tools like background removal and resizing. Ideogram specializes in text-to-image generation that actually renders readable text inside the image, which makes it a strong choice for logos, posters, and branded graphics. inPixio is a beginner-friendly photo editor — background removal, object removal, and one-click photo enhancement, positioned as a simpler alternative to Photoshop.

Match your graphics work to a tool

Graphic I make	How long it takes now	Tool to try

Presentations — Gamma

Gamma builds a presentation from a plain-language description, which you then customize. It's especially helpful for webinars and educational presentations — the kind of content most aging-in-place professionals create regularly for clients, referral partners, or their own marketing.

Describe a presentation you need to build right now (a client education piece, a training, a marketing deck). What would you type into Gamma to get a first draft started?

Who is it for, and when do you need it ready?

TOOL FOCUS

Video & Audio — Descript & ScreenPal

Both tools let you edit video by editing text rather than a timeline — delete a sentence in the transcript and the video edits itself, with auto captions and screen recording built in. The difference is emphasis: Descript is built broadly for video and podcast editing, while ScreenPal leans more toward educational content and accessibility features like translations, quizzes, and interactive video.

	Descript	ScreenPal
Text-based editing	Yes	Yes
Auto captions	Yes	Yes
Screen recording	Yes	Yes
Leans toward	Video & podcast editing	Education & accessibility

Which tool fits your needs better, and why?

Scheduling — Buffer

Once content is finished, Buffer schedules it across multiple social platforms at once. The point is preparing everything ahead of time instead of stopping every day to post — freeing up time to create more content instead of constantly publishing it.

How do you currently schedule or post your content?

If you batched a month of content in one sitting, what would that change about your week?

Map Your Own Workflow

The webinar's own workflow moves through eight steps — research, write, design, edit images, present, edit video, work from your own materials, then schedule. Use the same structure to map YOUR workflow and the tool you'll use at each step.

Step	Webinar's example tool	Your tool / task
1. Research	Perplexity	
2. Write	ChatGPT or Claude	
3. Design graphics	Canva, Ideogram, or ChatGPT	
4. Edit images	inPixio	
5. Build presentations	Gamma	
6. Edit video/audio	Descript or ScreenPal	
7. Work from my own materials	NotebookLM	
8. Schedule it	Buffer	

Each tool has one job. Together, they're meant to save you hours every month — not by replacing your judgment, but by clearing out the repetitive work around it.

DECISION POINT

Start With One Tool

You do not need to learn every AI tool. You only need to learn the one that solves your biggest problem. Check the one statement that's most true for you right now:

Writing is difficult.

Start with Claude and/or ChatGPT.

Graphics take forever.

Start with Ideogram, ChatGPT, and/or Canva.

Research overwhelms you.

Try Perplexity and/or NotebookLM.

Master one tool. Then add another. AI isn't about replacing your knowledge — it's about spending less time on repetitive tasks, so you can spend more time doing the work only you can do.

The ONE tool I'm starting with:

The ONE task I'll use it for this week:

COMMIT

Your Action Plan

Turn what you just learned into action. Commit to 2-3 specific steps you'll take in the next two weeks.

1. What I'll do, which tool, and by when:

2. What I'll do, which tool, and by when:

3. What I'll do, which tool, and by when (optional):

How will you know it worked? (e.g., hours saved, a task off your plate)

Want Help Applying This?

Workbooks are a great start, but sometimes it helps to talk it through with another person — especially when you're choosing between tools or trying to fit AI into an already-busy week. Esther offers two options for 1:1 support:

Need help applying this to your business?

If you'd like personalized guidance working through this workbook or applying the webinar content to your own practice, Esther offers 1:1 consultations:

- **30-Minute Consult — \$25 — [Book here](#)**
- **60-Minute Consult — \$50 — [Book here](#)**

Bring this workbook to your call — it's the fastest way to get straight to what matters for your business.

QUICK REFERENCE

The 11 Tools at a Glance

Claude	Long documents, large PDFs, thoughtful editing	claude.ai
ChatGPT	Conversational drafting, brainstorming, emails, quick scripts	chatgpt.com
Perplexity	Web research with sources; great for comparisons & current info	perplexity.ai
NotebookLM	Learns YOUR documents; Q&A, summaries, podcast-style audio	notebooklm.google.com
Gamma	Describe a presentation, get a professional first draft	gamma.app
Descript	Edit video/podcasts by editing the transcript; auto captions	descript.com
ScreenPal	Similar to Descript, with an educational/accessibility focus	screenpal.com
Ideogram	Text-to-image with accurate readable text — logos, posters	ideogram.ai
inPixio	Beginner-friendly photo editing — background & object removal	inpixio.com
Canva AI	Full design suite plus AI image generation and Magic Tools	canva.com
Buffer	Schedule and batch social content across platforms	buffer.com

Remember: you only need to learn the one tool that solves your biggest problem today. Add another when you're ready.