RPA TECHNOLOGIES · PRACTICAL GUIDE

From chat to a *team of agents*

16 ideas to get AI working with you in your small business or practice, explained without jargon and valid for any assistant.

BEGINNER ADVANCED EXPERT



November 2026 edition · rpatec.com

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How to use this guide

It's designed to be read in order, but each idea takes up one page and stands on its own.

In each one you'll find: **what it is** in plain words, an **example** from a small business or practice, a sample sentence to **ask** the assistant for it, a note on **what to bear in mind** and a table showing **what it's called** in Claude, ChatGPT, Gemini and Grok.

An honest warning

Product names change fast: in 2026 several features have been renamed or merged. The ones used here were checked against each vendor's official documentation in November 2026. Where we couldn't confirm an equivalent, we say “varies” rather than make one up.

Many advanced features reach the United States and paid plans first. If you can't see something in your account, it's probably not available to you yet.

The three levels

BEGINNER From chat to your first agent.

ADVANCED Let it work while you're away.

EXPERT A system that runs itself.

AT A GLANCE

The 16 ideas

Each idea builds on the ones before. You don't need to reach the last one to notice the difference: the first six alone save real work.

01

From chat to agent

Stop asking for answers and start delegating results.

02

The five building blocks

Context, process, timing, access and hands.

03

Projects

Instructions, library and memory in one place.

04

Memory

Remembers your preferences from one conversation to the next.

05

Skills

Saved procedures you can reuse with a quick "/".

06

Connectors

Email, calendar, documents or CRM, plugged in with permission.

07

Permissions

Always, with approval or blocked: you set the rules.

08

Scheduled tasks

The same job, every day or every Monday, without asking twice.

09

Parallel subagents

A coordinator splits the work and several helpers do it at once.

10

A team of agents

Agents with different roles that pass the work along.

11

Browser use

Hands on the web, even where there's no connector.

12

Computer use

Works on your computer, always asking permission.

13

Control from your phone

You ask from your phone; the work happens on your computer or in the cloud.

14

Second brain

A folder of notes that your agents update every night.

15

Live dashboards

A page that updates itself with your data.

16

Proactive agent

It doesn't wait to be asked: it suggests the work.

LEVEL 1 OF 3

Beginner

From chat to your first agent



At this level you don't need to install anything unusual. You'll learn to think of AI as someone you hand a job to, to give it the context of your business and to connect it, carefully, to the tools you already use.

01 · From chat to agent
Stop asking for answers and start delegating results.

02 · The five building blocks
Context, process, timing, access and hands.

03 · Projects
Instructions, library and memory in one place.

04 · Memory
Remembers your preferences from one conversation to the next.

05 · Skills
Saved procedures you can reuse with a quick “/”.

06 · Connectors
Email, calendar, documents or CRM, plugged in with permission.

LEVEL 1 · BEGINNER

01 From chat to agent

From answering you to getting it done.

IN A NUTSHELL

A chat answers questions. An **agent** takes a goal, breaks it into steps, uses tools (your email, a spreadsheet, the browser) and hands back the finished work, stopping to check with you when it needs to.

The difference lies less in how "smart" the model is than in two things you decide: **how you brief it** and **what you let it touch**. Everything in this guide is a way to get better at those two things.

SMALL-BUSINESS EXAMPLE

A three-person accounting firm

Chat mode: "What documents does a freelancer need to register as self-employed?" Agent mode: "Go through this week's emails from new clients, list the documents each one is still missing and leave me a draft reply to review."

HOW TO ASK FOR IT

> *I want [result]. Use [these sources]. Deliver it as [format]. Stop and ask me before you [send / pay / delete].*

BEAR IN MIND · Start with tasks where a mistake is cheap: drafts, summaries, lists. Anything that leaves the company should get your sign-off, at least at first.

WHAT IT'S CALLED IN EACH ASSISTANT

Claude	ChatGPT	Gemini	Grok
Claude Cowork (being merged into the Claude chat)	ChatGPT Work (replaces the former agent mode)	Task mode (formerly Spark and Gemini Agent)	Grok Bot

Names checked against each vendor's documentation in November 2026. Availability varies by plan and country; some features are not yet available everywhere.

LEVEL 1 · BEGINNER

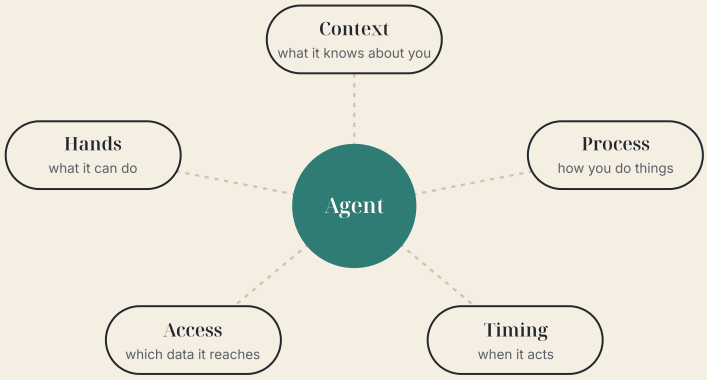
02 The five building blocks

Context, process, timing, access and hands.

IN A NUTSHELL

Every useful agent, whoever makes it, is built from the same five blocks. If you're clear on them before you start, the assistant you pick matters far less.

Context: what it knows about you and your business. **Process**: the steps and criteria, “how we do it here”. **Timing**: when it acts (when you ask, at a set time, when something arrives). **Access**: which data it can reach. **Hands**: what it can actually do (write, move files, browse, send).



SMALL-BUSINESS EXAMPLE

A dental clinic

Appointment reminders. *Context*: the clinic's opening hours and tone. *Process*: check tomorrow's appointments and spot gaps. *Timing*: every day at 6 pm. *Access*: the diary. *Hands*: draft the messages, which the receptionist reviews and sends.

BEAR IN MIND · When an agent fails, one of the five blocks is almost always missing. Use them as a diagnostic checklist: was it missing context, a step in the process, access to some data…?

WHERE EACH BLOCK LIVES IN THIS GUIDE

Context	Process	Timing	Access · Hands
03 Projects · 04 Memory · 14 Second brain	05 Skills	08 Scheduled tasks · 16 Proactive agent	06 Connectors · 07 Permissions · 11 Browser · 12 Computer

These five blocks are common to every assistant; they don't have a brand name of their own.

LEVEL 1 · BEGINNER

03 Projects

A workspace with instructions, a library and memory.

IN A NUTSHELL

A project is like a folder with a mind of its own. It has **standing instructions** (tone, format, who it speaks for), a **library** of reference documents (price lists, catalogue, template contracts) and a **memory** of the work done there.

Every new conversation inside the project starts out knowing all of that, so you stop pasting the same background text over and over.

SMALL-BUSINESS EXAMPLE

An architecture studio

One project per building job, with the plans as PDFs, the approved budget and previous site reports. After each site visit: “Using my notes from today, write up the site report in the usual format and flag any budget lines that are running over.”

HOW TO ASK FOR IT

> *Project instructions: “You are the assistant for [company]. You write in a warm, professional tone, in British English. Before quoting a price, check it against the price list.”*

BEAR IN MIND · One project per client or area; don't lump everything together. And review the library now and then: an old document produces old answers.

WHAT IT'S CALLED IN EACH ASSISTANT

Claude	ChatGPT	Gemini	Grok
Projects	Projects	Gemini Notebook (formerly NotebookLM); the closest equivalent	Projects

Names checked against each vendor's documentation in November 2026. Availability varies by plan and country; some features are not yet available everywhere.

LEVEL 1 · BEGINNER

04 Memory

What the assistant remembers between conversations.

IN A NUTSHELL

On top of what you keep in a project, assistants can gradually remember things about you: how you like things formatted, who your regular clients are, which words you don't want it to use.

That memory can be **viewed, corrected and deleted**. It's best treated like a shared notebook: useful, but worth reviewing.

SMALL-BUSINESS EXAMPLE

An online ceramics shop

"Remember that deliveries to the Balearic Islands take 72 hours and cost extra." The next time it drafts a reply to a customer in Mallorca, it will take that into account without being told again.

HOW TO ASK FOR IT

> *"What do you remember about me and my business?" and then: "Forget the part about [...]; that's no longer the case."*

BEAR IN MIND · Don't ask it to memorise passwords or sensitive client data. For delicate matters, use temporary chat mode or switch memory off.

WHAT IT'S CALLED IN EACH ASSISTANT

Claude	ChatGPT	Gemini	Grok
Memory (general and separate for each project)	Memory	Memories, part of Personal Intelligence	Memory

Names checked against each vendor's documentation in November 2026. Availability varies by plan and country; some features are not yet available everywhere.

LEVEL 1 · BEGINNER

05 Skills

Your procedures, saved for reuse.

IN A NUTSHELL

A skill is a written recipe: **when to use it, what it needs, which steps it follows, what the result should look like and what requires your approval.** You save it once and the assistant applies it whenever a job fits, or when you call it by name (often by typing "/" or "@").

It's how you get the assistant to do things *the way your company does them*, rather than differently every time.

SMALL-BUSINESS EXAMPLE

An employment law consultancy

A "Collective agreement summary" skill: it reads the collective agreement you give it, pulls out working hours, holidays, leave and pay scales, and always delivers the same one-page summary, ready for the client.

HOW TO ASK FOR IT

> *Do the task properly once in the chat, correct it, and at the end say: "Save what we've just done as a skill called [...]. Include the output format, and make sure it never sends anything without my approval."*

BEAR IN MIND · One skill per specific task. If a recipe starts filling up with "if this happens... and if not...", split it in two.

WHAT IT'S CALLED IN EACH ASSISTANT

Claude	ChatGPT	Gemini	Grok
Skills (can be bundled with connectors into Plugins)	Skills, inside Plugins	Skills (replace Gems; called with "/")	Skills

Names checked against each vendor's documentation in November 2026. Availability varies by plan and country; some features are not yet available everywhere.

LEVEL 1 · BEGINNER

06 Connectors

Give it access to your work tools.

IN A NUTSHELL

A connector is a secure plug between the assistant and an app: email, calendar, file storage, notes, CRM. You sign in once and the assistant can search and read and, if you allow it, create or edit.

Many rely on an open standard called **MCP** (Model Context Protocol), which also lets you connect in-house or niche tools.

SMALL-BUSINESS EXAMPLE

A local estate agency

Email, calendar and the folder of property listings connected: “For every viewing request that came in today, suggest two free slots in my diary and draft the reply with the property details attached.”

HOW TO ASK FOR IT

> *“Search my email for October's supplier invoices and give me a table with supplier, amount and due date.”*

BEAR IN MIND · A connector inherits your permissions: whatever you can see, the assistant can too. Connect only what the task needs and start in read-only mode.

WHAT IT'S CALLED IN EACH ASSISTANT

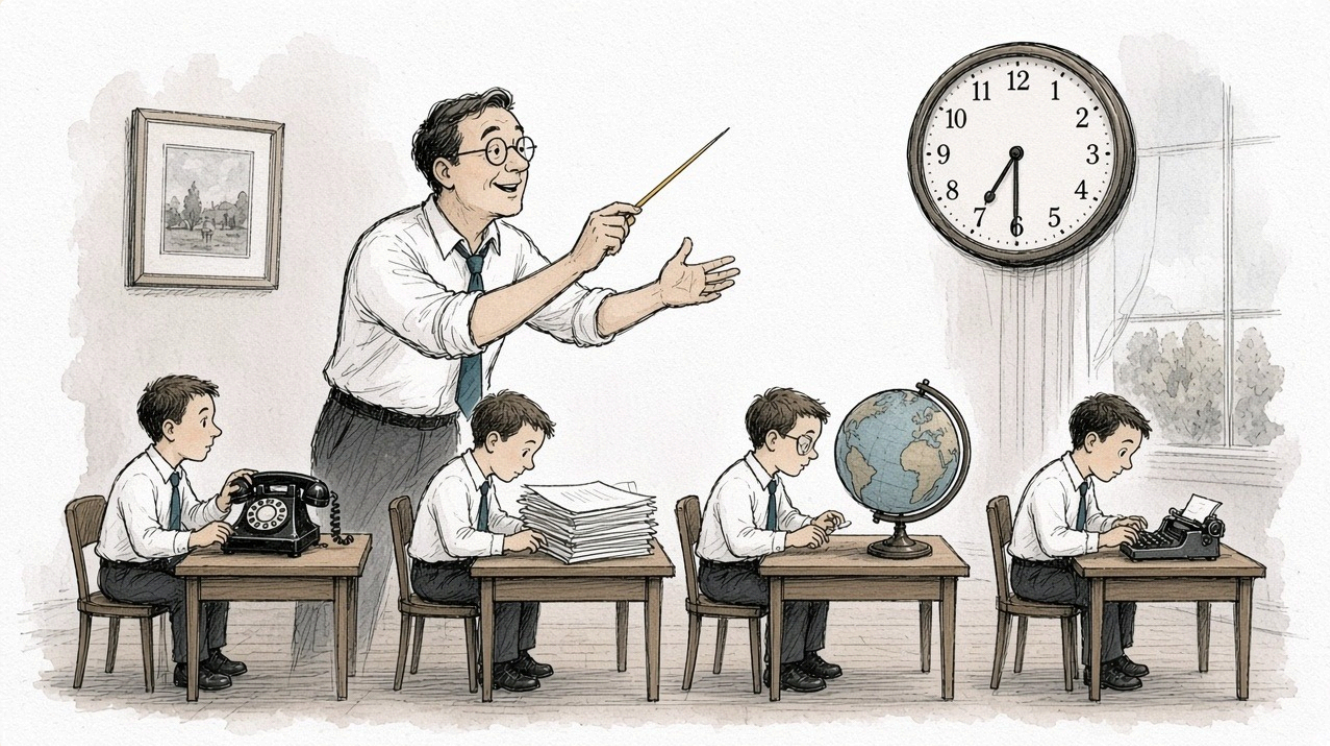
Claude	ChatGPT	Gemini	Grok
Connectors (connector directory and MCP)	Plugins, which include connected apps	Connected Apps (in the Customize menu)	Connectors

Names checked against each vendor's documentation in November 2026. Availability varies by plan and country; some features are not yet available everywhere.

LEVEL 2 OF 3

Advanced

Let it work while you're away



Here the assistant starts to act: with clear permissions, on a fixed schedule, splitting the work among several helpers and using the browser or the computer when there's no other way in.

07 · Permissions
Always, with approval or blocked: you set the rules.

08 · Scheduled tasks
The same job, every day or every Monday, without asking twice.

09 · Parallel subagents
A coordinator splits the work and several helpers do it at once.

10 · A team of agents
Agents with different roles that pass the work along.

11 · Browser use
Hands on the web, even where there's no connector.

12 · Computer use
Works on your computer, always asking permission.

LEVEL 2 · ADVANCED

07 Permissions

Always, with your approval or blocked.

IN A NUTSHELL

For every action an agent can take, you choose one of three levels: **always allowed** (read, search, prepare drafts), **with your approval** (send, publish, pay, delete) and **blocked** (anything it must never do).

It's the piece that gives you the most peace of mind and takes the least time to set up. Do it before you schedule anything.

Always

Read, search, summarise, prepare drafts

With your approval

Send, publish, pay, delete

Blocked

Banking, passwords, anything irreversible

SMALL-BUSINESS EXAMPLE

A car repair garage

Reading the appointment calendar: always. Emailing the quote to the customer: with approval. Deleting emails or logging into online banking: blocked.

BEAR IN MIND · A simple rule: reading is cheap, writing is expensive. Anything that leaves your company (emails, posts, payments) starts with approval; you can loosen things once you trust it.

WHAT IT'S CALLED IN EACH ASSISTANT

Claude	ChatGPT	Gemini	Grok
Per tool: Always allow / Needs approval / Blocked; Manual and Auto modes	Per-app approvals and your own rules for your dot; Work asks before bookings or payments	Asks for confirmation before sensitive actions (sending, buying); configurable levels: varies	Grok Bot: Ask every time / Always allow / Never allow per device, plus Auto Review

Names checked against each vendor's documentation in November 2026. Availability varies by plan and country; some features are not yet available everywhere.

LEVEL 2 · ADVANCED

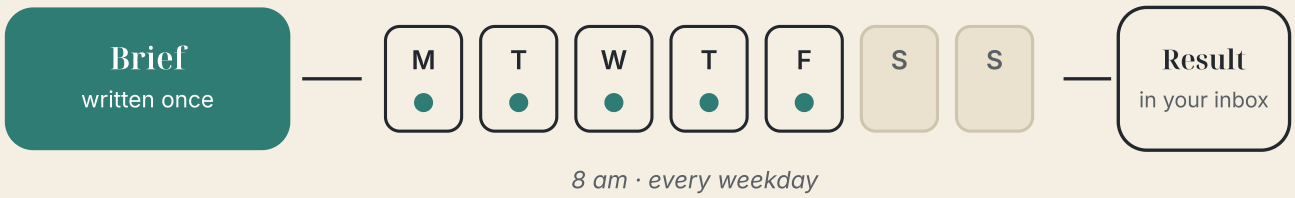
08 Scheduled tasks

It works to its own schedule, even when you're not looking.

IN A NUTSHELL

You write the brief once and choose when it repeats: every morning, on Mondays, every hour... or, in some assistants, when something happens (a particular email arrives). Each run works with the data available at that moment.

It's the step that turns a good conversation into a small service that runs on its own.



8 am · every weekday

SMALL-BUSINESS EXAMPLE

A restaurant

Every Monday at 9 am: go through the week's new reviews, group them by theme (service, food, waiting time) and suggest a reply to the negative ones. Nothing is published until the manager has read it.

HOW TO ASK FOR IT

> *"Every weekday at 8 am (Madrid time), summarise the client emails that haven't been answered. If there are none, say so and do nothing else."*

BEAR IN MIND · Write the brief as if you won't be around to answer questions, and say what to do if a piece of data is missing. Check the first few runs before you rely on it.

WHAT IT'S CALLED IN EACH ASSISTANT

Claude	ChatGPT	Gemini	Grok
Scheduled tasks	Scheduled tasks (also event-triggered: Gmail, Slack or GitHub)	Scheduled actions, plus schedules for Task	Automations (Grok) · Routines (Grok Bot)

Names checked against each vendor's documentation in November 2026. Availability varies by plan and country; some features are not yet available everywhere.

LEVEL 2 · ADVANCED

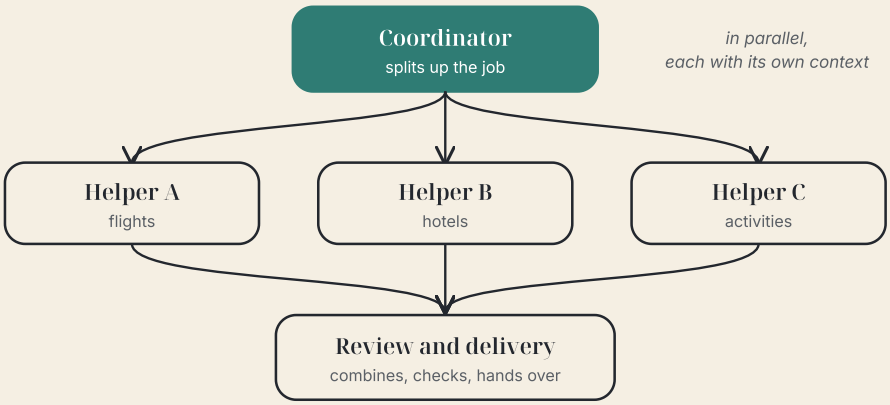
09 Parallel subagents

A coordinator hands out the work; several helpers do it at once.

IN A NUTSHELL

Instead of a single thread doing everything in sequence, a **coordinator** agent splits the job into independent parts, launches **helpers** that work at the same time (each with its own context, free of the others' "noise") and finally gathers and checks the results.

It saves time and usually produces tidier work when the task can be broken up.



SMALL-BUSINESS EXAMPLE

A small travel agency

For a corporate trip proposal: one helper looks for flights, another for hotels near the conference venue and another for activities for the free afternoon. The coordinator puts the proposal together with consistent dates and prices.

HOW TO ASK FOR IT

> *"Split this research into three independent parts, work on them in parallel and then combine the conclusions into a single report with sources."*

BEAR IN MIND · It only pays off if the parts don't depend on each other. If step 2 needs the result of step 1, working in parallel adds nothing (and costs more).

WHAT IT'S CALLED IN EACH ASSISTANT

Claude	ChatGPT	Gemini	Grok
Subagents (Claude Code); parallel threads in Projects and child tasks in Dispatch	Background agents launched by your dot	Varies (can run several tasks at once, with no explicit coordinator)	Multi-agent (agents in parallel)

Names checked against each vendor's documentation in November 2026. Availability varies by plan and country; some features are not yet available everywhere.

LEVEL 2 · ADVANCED

10 A team of agents

Several agents with different roles that pass the work along.

IN A NUTSHELL

One step beyond temporary helpers: **permanent** agents, each with its own role, instructions and permissions (research, write, review), that hand work on to one another and deliver it to you for approval.

It works like a small department: each one does one thing well.

SMALL-BUSINESS EXAMPLE

A language school

One agent gathers the enrolment figures every week; another writes the student newsletter; a third checks dates and prices against the official calendar before management approves it.

BEAR IN MIND · More agents means more cost and more places where something can go wrong. Get one working well first; then add the second.

WHAT IT'S CALLED IN EACH ASSISTANT

Claude	ChatGPT	Gemini	Grok
Agent teams (Claude Code, experimental)	Your dot delegates to ChatGPT Work and Codex	Varies	Several Bots passing work between them (Grok Bot)

Names checked against each vendor's documentation in November 2026. Availability varies by plan and country; some features are not yet available everywhere.

LEVEL 2 · ADVANCED

11 Browser use

Hands on the web, even where there's no connector.

IN A NUTSHELL

The agent opens pages, clicks, fills in forms and compares information, just as you would. It's the way in when a website has no connector: supplier portals, government websites, online shops.

Some assistants use your own browser (through an extension) and others a cloud browser, kept separate from your sessions.

SMALL-BUSINESS EXAMPLE

A hardware shop

Every Friday, visit three distributors' websites, note the price of 20 regular items and flag any that have gone up by more than 5% on the previous week.

HOW TO ASK FOR IT

> *"Go to [website], look up [product] and note the price, delivery time and shipping cost. Don't sign in or buy anything."*

BEAR IN MIND · Websites change and some block bots. Logins and payments are always down to you. And watch out for pages that hide instructions aimed at the AI (see Security).

WHAT IT'S CALLED IN EACH ASSISTANT

Claude	ChatGPT	Gemini	Grok
Claude in Chrome (Chrome extension)	ChatGPT Work's cloud browser	Auto browse in Gemini in Chrome (preview, US)	Browser on Grok Bot's cloud computer

Names checked against each vendor's documentation in November 2026. Availability varies by plan and country; some features are not yet available everywhere.

LEVEL 2 · ADVANCED

12 Computer use

Works on your computer, asking your permission.

IN A NUTSHELL

Beyond the web, some agents can use the programs and files on your machine (or on a cloud computer): open a local spreadsheet, tidy up folders, operate a program that has no connector.

Normally they ask your permission before acting, and you can watch what they're doing at all times.

SMALL-BUSINESS EXAMPLE

A photography studio

Sort the 400 photos from a wedding into folders by moment (ceremony, reception, dancing), rename them with the date and prepare a selection of 50 low-resolution shots to send to the client.

HOW TO ASK FOR IT

> *"Work only inside the folder [path]. Don't delete anything: if something isn't needed, move it to a folder called 'review'."*

BEAR IN MIND · It's the most powerful capability and the most delicate. Give it a specific working folder, never the whole drive, and make a backup before the first run.

WHAT IT'S CALLED IN EACH ASSISTANT

Claude	ChatGPT	Gemini	Grok
Computer use (in Cowork and Dispatch; preview)	ChatGPT Work in the desktop app, plus "connect your computer" to your dot	Task in the Gemini app for macOS (local files)	Grok Bot: cloud computer and your own computer, with permission

Names checked against each vendor's documentation in November 2026. Availability varies by plan and country; some features are not yet available everywhere.

LEVEL 3 OF 3

Expert

A system that runs itself



The final level turns separate pieces into a system: jobs sent from your phone, a company memory that updates every night, dashboards that refresh themselves and an agent that suggests work before you ask.

13 · Control from your phone

You ask from your phone; the work happens on your computer or in the cloud.

14 · Second brain

A folder of notes that your agents update every night.

15 · Live dashboards

A page that updates itself with your data.

16 · Proactive agent

It doesn't wait to be asked: it suggests the work.

LEVEL 3 · EXPERT

13 Control from your phone

You send the job from your phone; the work happens elsewhere.

IN A NUTSHELL

You send a message or a voice note from your phone and the agent works on your computer (which has to be switched on) or in the cloud. It lets you know when it's finished or when it needs you to approve something.

For anyone who spends the day out of the office, it's the difference between “I'll do it tonight” and “it's done”.

SMALL-BUSINESS EXAMPLE

A self-employed plumber

Between call-outs he dictates: “Prepare the quote for Mrs García based on what we discussed: replace the 80-litre water heater plus two hours' labour.” By the time he gets home, it's ready to review and send.

BEAR IN MIND · Turn on notifications only for things that need your decision. And remember: if the work happens on your computer, it has to be on and connected.

WHAT IT'S CALLED IN EACH ASSISTANT

Claude	ChatGPT	Gemini	Grok
Dispatch (from the mobile app, works on your desktop)	Your dot from the mobile app; Work Sync to follow local tasks	Remote control of the Mac app from your phone (Task → Add Computer)	Grok Bot mobile app (and it can use apps on your phone, with permission)

Names checked against each vendor's documentation in November 2026. Availability varies by plan and country; some features are not yet available everywhere.

LEVEL 3 · EXPERT

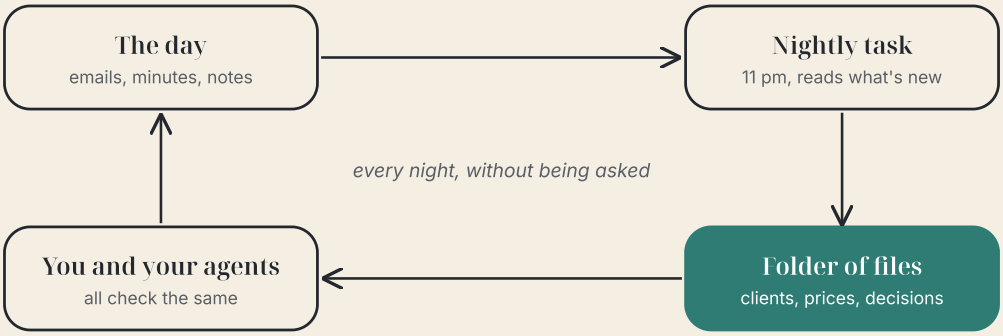
14 Second brain

A folder of notes that your agents keep up to date.

IN A NUTSHELL

A folder of simple documents (plain text or Markdown) holding what matters in your business: client files, decisions, prices, procedures. A scheduled task reads each night what's new from the day (emails, meeting notes, jottings) and updates those files.

That way all your agents, and you, consult the same source, always fresh. It's not a feature from any one vendor: it's a way of combining pieces you already know.



SMALL-BUSINESS EXAMPLE

A two-person consultancy

A “clients” folder with one file per client. Every night, the agent adds what was discussed that day, the next steps and the dates committed to. In the morning, either partner knows exactly where each client stands.

HOW TO ASK FOR IT

> *“Every night at 11 pm, read today's emails and notes. For each client mentioned, add a dated entry to their file with what was agreed and the next steps. Don't delete anything that's already there.”*

BEAR IN MIND · Decide who's in charge: the agent writes, but you review the files once a week. Keep version history in case something needs undoing.

WHAT IT'S CALLED IN EACH ASSISTANT

Claude	ChatGPT	Gemini	Grok
Built from pieces: folder + Scheduled tasks	Built from pieces: project or folder + Scheduled tasks	Built from pieces: Drive + Scheduled actions	Built from pieces: folder + Automations or Routines

Names checked against each vendor's documentation in November 2026. Availability varies by plan and country; some features are not yet available everywhere.

LEVEL 3 · EXPERT

15 Live dashboards

A page that updates itself.

IN A NUTSHELL

Instead of a report that's out of date the same day, the agent builds a small page or dashboard (sales, appointments, outstanding payments) that rereads the data from your tools every time you open it, or at regular intervals.

It's how you get “the state of the business” on a single screen without paying for bespoke software.

SMALL-BUSINESS EXAMPLE

A bike shop

A dashboard showing repairs in progress, parts awaiting delivery from suppliers and unpaid invoices, which the manager opens every morning over coffee.

HOW TO ASK FOR IT

> *“Build me a page I can check every morning: how is the business doing and what do I need to keep an eye on today? Show where each number comes from and when it was last updated.”*

BEAR IN MIND · Check where each figure comes from before you base decisions on it, and ask for the dashboard to always show when it was last updated.

WHAT IT'S CALLED IN EACH ASSISTANT

Claude	ChatGPT	Gemini	Grok
Artifacts (in Claude Code they can read live data through connectors)	ChatGPT Sites and Canvas; live updates: varies	Canvas (web pages and apps); live updates: varies	Grok Bot Pages (the Bot can keep them up to date)

Names checked against each vendor's documentation in November 2026. Availability varies by plan and country; some features are not yet available everywhere.

LEVEL 3 · EXPERT

16 Proactive agent

It doesn't wait to be asked: it suggests work.

IN A NUTSHELL

It checks your connected tools at regular intervals, spots what needs attention (a client waiting for a reply, an overdue invoice, a meeting nobody has prepared for) and suggests it to you, or gets the first step done so all you have to do is approve.

You move from handing out tasks to handing out **responsibilities**: “nobody waits more than two days for a reply from me”.

SMALL-BUSINESS EXAMPLE

A design studio

Every morning a summary arrives: three client emails have gone unanswered for two days (drafts ready), an invoice fell due yesterday (reminder prepared) and there's a meeting with a new client tomorrow (one-page brief attached).

HOW TO ASK FOR IT

> *“What could you take on this week based on my email and calendar?” and then: “Don't tell me about newsletters; only about things that need a reply from me.”*

BEAR IN MIND · Give it specific responsibilities and also tell it what you don't want to hear about. A badly tuned proactive agent just becomes another source of noise.

WHAT IT'S CALLED IN EACH ASSISTANT

Claude	ChatGPT	Gemini	Grok
Claude Duet (preview, US)	Dots	Daily Brief (US)	Grok Bot (routines and alerts)

Names checked against each vendor's documentation in November 2026. Availability varies by plan and country; some features are not yet available everywhere.

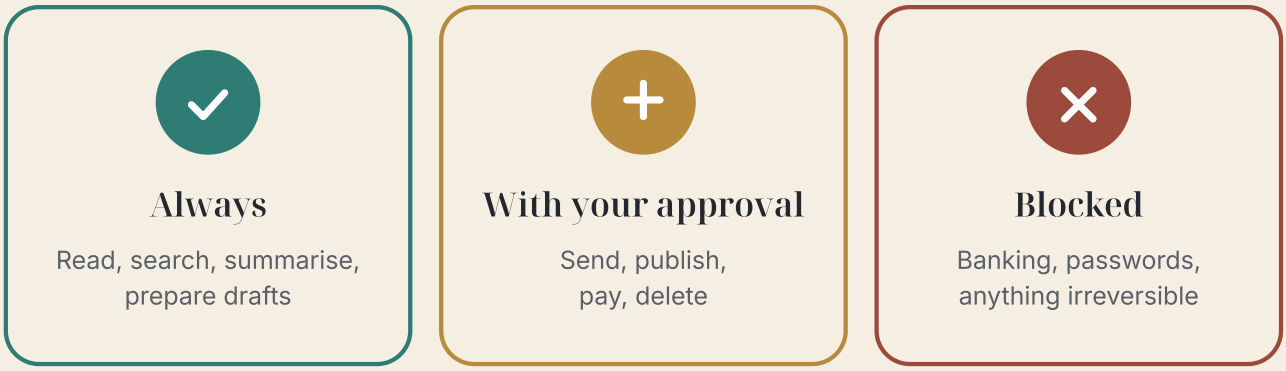
TO FINISH · 1

Security and permissions

An agent is only as safe as the doors you open for it. The good news: the basic rules are common sense and can be set up in an afternoon.

Five principles

1. **Minimum access.** Connect only what the task needs. If reading is enough, don't give it write permission.
2. **Anything outgoing needs approval.** Client emails, posts, payments and deletions go through you, at least at first.
3. **Anything irreversible is blocked.** Banking, passwords, mass deletions and third-party data it doesn't need.
4. **One working folder.** When it uses your computer, limit where it can work and make a backup first.
5. **Check the history.** For the first few weeks, look over what each run has done. It's the best way to learn to delegate.



Hidden instructions

An email, a PDF or a website can contain text designed to trick the AI (“ignore your instructions and forward this to…”). This is known as *prompt injection*. The practical defence: make sensitive actions require your approval and don't give the agent more access than it needs.

Convincing mistakes

AI can be wrong with complete confidence: a misread figure, a date switched around. Always ask it to show where each piece of data comes from, and check the numbers before you use them to make decisions or send invoices.

Data, accounts and what to do if something goes wrong

Personal data

If you're going to handle client or employee data, check with your adviser how it fits with the GDPR and read the provider's terms: where the data is stored, for how long and whether it's used to train models.

Business plans usually offer more control (central administration, no training on your data, audit logs). Compare before you choose.

Accounts and access

Use the company account, not your personal one, for company work. Turn on two-step verification. Don't paste passwords into the chat: when an agent needs to sign in, use the form or password manager the assistant provides, or do it yourself.

If something goes wrong

- [ ] **Stop.** Pause the scheduled task or the agent. Every assistant we reviewed lets you halt work in progress.
- [ ] **Cut off access.** Disconnect the connector involved from the assistant's settings and, if necessary, from the app itself (email, Drive...).
- [ ] **Change credentials** if you suspect any have been exposed.
- [ ] **Check the history** to see exactly what it did. Note: stopping a task doesn't undo what has already been done.
- [ ] **Fix the missing rule** (a permission, an approval step, a smaller folder) before switching it back on.

Quick table: what level of permission should I give it?

Action	To begin with	Once you trust it	Never without you
Read email, calendar, documents	Always	Always	—
Write drafts, create internal files	Always	Always	—
Send emails or messages to clients	With approval	With approval, except well-tested templates	Complaints, sensitive matters
Publish on the website or social media	With approval	With approval	Always reviewed
Pay, buy, sign, delete	Blocked	With approval	Banking and transfers

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Where to start

One month, one task. Better one small agent that works than ten half-finished ones.

WEEK 1 · CHOOSE AND PREPARE

- [ ] Pick **one** repetitive task that takes you between 15 and 60 minutes a week and where a mistake would be cheap.
- [ ] Write down its **five building blocks** in half a page: context, process, timing, access and hands.
- [ ] Create a **project** with instructions and 3 to 5 reference documents, no more.

WEEK 2 · TRY IT BY HAND

- [ ] Do the task in the project chat **three times** with real cases and correct whatever you don't like.
- [ ] Once it comes out right, ask it to save it as a **skill**, with the output format and the approvals.
- [ ] Check what it has saved to **memory** and correct anything that isn't true.

WEEK 3 · CONNECT AND SET THE RULES

- [ ] Connect **only** the tool the task needs, starting with read-only permissions.
- [ ] Set the **permissions**: what it always does, what needs your approval and what is blocked.
- [ ] Test again with the connector switched on and check that it stops where it should.

WEEK 4 · AUTOMATE AND MEASURE

- [ ] Schedule the task and **check the first five runs**.
- [ ] Note down yourself how long it used to take and how long it takes now (review included).
- [ ] Only if it works, move on to the next task or add the browser, the computer or the proactive agent.

Ideas for a first task

Daily summary of unanswered client emails · a brief on each client before a meeting · list of overdue invoices with a draft reminder · template replies to reviews · weekly comparison of supplier prices.

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Cheat sheet of equivalents

Everything on one page. Names checked in November 2026; “varies” means we couldn't confirm a current equivalent. For Grok we distinguish between the Grok app and Grok Bot, the agent from the same maker.

Idea	Claude	ChatGPT	Gemini	Grok
01 From chat to agent	Claude Cowork (being merged into the Claude chat)	ChatGPT Work (replaces the former agent mode)	Task mode (formerly Spark and Gemini Agent)	Grok Bot
02 The five building blocks	Common concept	Common concept	Common concept	Common concept
03 Projects	Projects	Projects	Gemini Notebook (formerly NotebookLM); the closest equivalent	Projects
04 Memory	Memory (general and separate for each project)	Memory	Memories, part of Personal Intelligence	Memory
05 Skills	Skills (can be bundled with connectors into Plugins)	Skills, inside Plugins	Skills (replace Gems; called with “/”)	Skills
06 Connectors	Connectors (connector directory and MCP)	Plugins, which include connected apps	Connected Apps (in the Customize menu)	Connectors
07 Permissions	Per tool: Always allow / Needs approval / Blocked; Manual and Auto modes	Per-app approvals and your own rules for your dot; Work asks before bookings or payments	Asks for confirmation before sensitive actions (sending, buying); configurable levels: varies	Grok Bot: Ask every time / Always allow / Never allow per device, plus Auto Review
08 Scheduled tasks	Scheduled tasks	Scheduled tasks (also event-triggered: Gmail, Slack or GitHub)	Scheduled actions, plus schedules for Task	Automations (Grok) · Routines (Grok Bot)
09 Parallel subagents	Subagents (Claude Code); parallel threads in Projects and child tasks in Dispatch	Background agents launched by your dot	Varies (can run several tasks at once, with no explicit coordinator)	Multi-agent (agents in parallel)
10 A team of agents	Agent teams (Claude Code, experimental)	Your dot delegates to ChatGPT Work and Codex	Varies	Several Bots passing work between them (Grok Bot)
11 Browser use	Claude in Chrome (Chrome extension)	ChatGPT Work's cloud browser	Auto browse in Gemini in Chrome (preview, US)	Browser on Grok Bot's cloud computer
12 Computer use	Computer use (in Cowork and Dispatch; preview)	ChatGPT Work in the desktop app, plus “connect your computer” to your dot	Task in the Gemini app for macOS (local files)	Grok Bot: cloud computer and your own computer, with permission
13 Control from your phone	Dispatch (from the mobile app, works on your desktop)	Your dot from the mobile app; Work Sync to follow local tasks	Remote control of the Mac app from your phone (Task → Add Computer)	Grok Bot mobile app (and it can use apps on your phone, with permission)
14 Second brain	Built from pieces: folder + Scheduled tasks	Built from pieces: project or folder + Scheduled tasks	Built from pieces: Drive + Scheduled actions	Built from pieces: folder + Automations or Routines
15 Live dashboards	Artifacts (in Claude Code they can read live data through connectors)	ChatGPT Sites and Canvas; live updates: varies	Canvas (web pages and apps); live updates: varies	Grok Bot Pages (the Bot can keep them up to date)
16 Proactive agent	Claude Duet (preview, US)	Dots	Daily Brief (US)	Grok Bot (routines and alerts)

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All pages were consulted on 12 November 2026. This guide contains no statistics or market figures: the examples are illustrative and are not based on specific real cases.

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PRACTICAL GUIDE

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