

Perplexity Quick-Start Checklist

The short version of *Build Your Own AI Research Department*. Keep it next to your monitor. Every box is clickable if you fill this in on screen.

SET UP ONCE

- ☐ Create your Perplexity account. A paid plan unlocks longer Research runs and file uploads.
- ☐ Learn the three things that matter on screen: **the answer**, **the citations**, **the follow-up box**.
- ☐ Find the mode switcher. Quick **Search** for a fast answer; **Research** when you want it to read many sources and write a report.
- ☐ Open your privacy settings and decide whether your data may be used for training.
- ☐ Save your service area and service list somewhere you can copy from. It goes in every prompt.
- ☐ Create one Space or Project so ongoing work (market, partners, products) doesn't get lost.

THE FOUR-STEP LOOP — RUN IT ON EVERY QUESTION

ASK	VERIFY	DIG DEEPER	APPLY
A professional question, not a keyword. Not "grab bars seniors." Instead: what does current evidence say about grab-bar placement for older adults with balance limitations?	Click the citations. Every time. Type: Which claims in your answer are supported by primary sources, and which are not?	Stay in the thread and push back. Type: What are the limitations here? What evidence contradicts this? When would it be inappropriate?	Turn research into a decision. Type: Based on this, what should an aging-in-place professional consider in a client's home?

THE FIVE JOBS

Check each one off after you have run it once for your own business.

- ☐ **1 Find local business opportunities**
 Profile your county: 65+ population and trend, older-adult homeownership, age of the housing stock, disability and mobility prevalence, senior housing supply, aging-at-home programs. Demand Census, government, university and nonprofit sources with the year of the data. Close by asking for five unmet needs.
- ☐ **2 Build a referral network**
 Ask for 10 organizations near you that already serve older adults but don't compete with you. Require a website, evidence they serve older adults, confirmation they are currently operating, and a reason to contact them that isn't "send me referrals."
- ☐ **3 Research products properly**
 One category, three strongest options: cost, installation, subscriptions, warranty, weight limits, caregiver requirements, documented complaints, and when it would **not** be appropriate. Manufacturer docs over affiliate review sites. Comparison table with citations.
- ☐ **4 Answer "can we get help paying for this?"**
 Federal, state, county, nonprofit, Medicaid waiver and VA programs. For each: what it pays for, eligibility, geography, whether funding is currently available, how to apply, official source. Tell it not to assume a program is active and to flag what it cannot verify.
- ☐ **5 Let it read the boring stuff**
 Upload a manual, spec sheet, program guide, housing study or research paper (40 MB limit). Ask for the five things you most need to know, warnings that affect an older adult, what you might overlook, what to investigate further, and the page number for each point.

Don't fall in love with the answer. Look at the evidence behind the answer.

BEFORE YOU TRUST IT

- ☐ I clicked at least three citations and the sources say what the answer claims they say.
- ☐ I checked the **date** on every statistic, program and price. Old page, dead program.
- ☐ I asked: *Which parts of this could not be verified from a primary source?*
- ☐ I asked for the other side: *What evidence contradicts this?*
- ☐ Anything involving money, eligibility or safety was confirmed by phone or an official government page before I repeated it to a client.
- ☐ No affiliate review site is the only source behind a product claim I am making.
- ☐ I could name my source out loud if a client or an adult child asked me where this came from.
- ☐ The recommendation is my professional judgment. AI did the reading; I did the deciding.

PRIVACY GUARDRAILS FOR CLIENT WORK

- ☐ No identifiable client assessments, photos, intake forms or medical records. Ever.
- ☐ Strip names, addresses, birthdates, phone numbers and photos first — or retype only the facts you need analyzed.
- ☐ Uploads stay private unless you share the session, but files still sit on a server. Session files are retained for a period; files in a Space or Project stay until you delete them.
- ☐ Delete uploads and sessions when the project is done.
- ☐ If you are covered by HIPAA or a business associate agreement, check it before you upload anything about a real person.

BONUS: YOUR MONDAY MORNING INTELLIGENCE BRIEFING

Scheduled Tasks lives in Perplexity Computer, uses Computer credits, and availability depends on your plan.

- ☐ Set a weekly recurring task on aging in place, home accessibility, fall prevention, AgeTech and home modifications.
- ☐ Restrict it to genuinely new items: research, government programs, regulatory changes, product launches, recalls and safety notices.
- ☐ Require a reason each item matters to an aging-in-place professional, plus the original source.
- ☐ Explicitly exclude generic articles and recycled advice.
- ☐ Block 20 minutes Monday to read it — and pull one item into a newsletter, post or client conversation.

YOUR FIRST SEVEN DAYS

One job a day. Write in the date you finished it.

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| ☐ Day 1 | Set up your account, privacy settings and one saved Space. | _____ |
| ☐ Day 2 | Run the local market prompt for your county. Save the report. | _____ |
| ☐ Day 3 | Run the referral partner prompt. Pick your first five to contact. | _____ |
| ☐ Day 4 | Send two outreach messages using the non-referral reason you found. | _____ |
| ☐ Day 5 | Run product due diligence on the category clients ask about most. | _____ |
| ☐ Day 6 | Run the funding prompt for your state. Verify the top three. | _____ |
| ☐ Day 7 | Upload the long document you've been avoiding. Set up the Monday briefing. | _____ |