



Perplexity for Aging in Place Pros: Build Your Own AI Research Department

How to find opportunities, research referral partners, investigate products, verify information, and make smarter business decisions in less time.

The promise:

By the end of this webinar, you'll know how to use Perplexity for five specific jobs that normally eat up hours of your week.

The Beauty of Perplexity is it's **Live Research** Capabilities

Think about how much time you spend searching for information.

You might be researching a product for a client, looking for local programs that help pay for home modifications, trying to identify referral partners, wondering what your competitors offer, or checking whether something you heard about Medicare is actually true.

Most of us do this by opening Google, clicking six websites, opening twelve tabs, getting distracted, and eventually trying to piece together an answer.

This is where I think Perplexity is incredibly useful.

"I don't think of Perplexity as another chatbot. I think of it as a research assistant."

The biggest difference between Perplexity and other AI programs is that other AI programs search from a database that they update every few months. Perplexity **searches the live web** and attaches citations to its answers, which is why it fits this kind of work particularly well.

So, you may get an answer from Claude or ChatGPT that's based on information from 3 months ago. But the answer you get from Perplexity is based on what is LIVE on the Internet today.

What Makes Perplexity Different

ChatGPT

"Help me think, create, analyze and work through scheduling pins for pinterest."

Google

"Help me find webpages selling aging in place services."

Perplexity

"Research this question and show me where the information came from."

That's enough.

Then point out three things on screen:

The answer. The citations. The follow-up box.

And tell them:

"The citations are actually the important part. Don't fall in love with the answer. Look at the evidence behind the answer."

For bigger questions, you can switch to Research mode, which performs multiple searches, reads many sources, reasons through them and produces a more comprehensive report.

DEMO #1: Find Local Business Opportunities

Scenario

"Imagine I'm an aging-in-place consultant trying to figure out where the opportunity is in my local market."

Copy this prompt into Perplexity:

Analyze the aging-in-place market in Gwinnett County, Georgia.

Research:

- population of adults 65+ and how it is changing
- homeownership among older adults
- age of the local housing stock
- prevalence of disability or mobility limitations
- availability of senior housing
- programs supporting aging at home
- other indicators that may create demand for aging-in-place services

Prioritize Census, government, university, nonprofit and other authoritative sources.

Cite every important statistic and identify the year of the data.

Finish by identifying five potential unmet needs or business opportunities for an aging-in-place professional.

Then DON'T start a new search.

Type this follow-up:

Of those opportunities, which three appear most promising for a small aging-in-place business, and why?

And then:

What services could a CAPS professional, occupational therapist, contractor or home safety professional offer to address those needs?

DEMO #2: Build a Referral Network

Most professionals know they need referral partners. The problem is figuring out who those partners actually are.

Prompt:

I provide aging-in-place and home safety services in Gwinnett County, Georgia.

Research potential referral partners within this area who already serve older adults but do not directly compete with an aging-in-place consultant.

Look for organizations such as:

- elder law attorneys
- aging life care professionals
- home health agencies
- physical and occupational therapy practices
- senior move managers
- Realtors specializing in older adults
- senior centers
- senior living communities
- geriatric healthcare practices
- caregiver organizations

Identify 10 strong prospects.

For each, provide:

1. Organization name
2. Website
3. What they do
4. Why they may be a good referral partner
5. Evidence that they serve older adults
6. A useful reason I could contact them that does NOT begin with asking them to send me referrals.

Verify that each organization appears to be currently operating.

That last instruction is important.

Then follow with:

Rank these 10 organizations according to which five I should contact first. Explain your reasoning.

Now Perplexity isn't just finding businesses.

It's helping answer: **"Who should I spend my limited networking time on?"**

DEMO #3: Become a Better Product Researcher

"Clients constantly ask us about products we've never personally used. AI should never replace professional judgment, but it can make the research process much faster."

Choose a product category your audience understands: stairlifts, automated medication dispensers, monitoring systems, bidet seats, smart locks, transfer devices, shower products, etc.

Product due-diligence prompt:

Research the leading [PRODUCT TYPE] currently available in the United States for older adults aging at home.

Do not simply give me a list of features.

For the strongest three options, investigate:

- approximate cost
- installation requirements
- ongoing subscription costs
- warranty
- weight or physical limitations
- accessibility considerations
- caregiver requirements
- compatibility requirements
- documented complaints or limitations
- situations where this product would NOT be appropriate

Prioritize manufacturer documentation and independent reputable sources over affiliate review sites.

Create a comparison table and cite your sources.

Then follow up with:

What questions should an aging-in-place professional ask the client before recommending any of these products?

DEMO #4: Answer the "Can We Get Help Paying for This?" Question

Prompt:

Research current programs that may help an older homeowner in Georgia pay for accessibility or aging-in-place home modifications such as ramps, grab bars, bathroom modifications, doorway widening or other safety improvements.

Investigate federal, state, county, nonprofit, Medicaid waiver, VA and other programs where applicable.

For each program provide:

- what it may pay for
- basic eligibility
- geographic restrictions
- whether funding is currently available
- how someone applies
- the official source

Do not assume a program is active simply because an older webpage mentions it.

Prioritize current government and program sources.

Clearly identify anything you cannot verify.

Those final two sentences are enormously important.

You're telling Perplexity: **Don't just find me information. Try to verify it.**

DEMO #5: Let Perplexity Read the Boring Stuff

Perplexity currently accepts PDFs and other text files, along with images, audio and video; files are limited to 40 MB.

You could upload:

- a 48-page product installation manual
- a research paper
- a government program guide
- an accessibility report
- a manufacturer specification sheet
- a housing study

Prompt:

Analyze this document from the perspective of an aging-in-place professional.

Give me:

1. The five things I most need to know
2. Any limitations, exclusions or warnings that could affect an older adult
3. Anything I might easily overlook
4. Questions I should investigate further
5. The page number where each important point appears.

Important privacy note

"Don't upload an identifiable client assessment just because you can."

Perplexity says uploaded files remain private unless you share the session, but retention and account/privacy settings still matter. Files attached to ordinary sessions are generally retained for a period of time, while files placed in persistent repositories/projects can remain until deleted.

Teach Your Framework

ASK → VERIFY → DIG DEEPER → APPLY

ASK

Don't search: "Grab bars seniors"

Search: "What does current evidence tell us about grab-bar placement for older adults with balance limitations?"

VERIFY

Click the citations.

Ask: Which claims in your answer are supported by primary sources?

DIG DEEPER

This is where Perplexity gets useful.

Ask: What are the limitations of this recommendation? Or: What evidence contradicts this? Or: Under what circumstances would this recommendation be inappropriate?

APPLY

Finally: Based on this research, what should an aging-in-place professional consider when evaluating this issue in a client's home?

That's the professional's job.

BONUS: Create Your Own Industry Intelligence Service

Perplexity's current Scheduled Tasks feature lives in **Perplexity Computer** and can run recurring monitoring, reports, alerts and briefings. These runs use Computer credits and availability depends on the user's plan/access.

Show this:

Every Monday morning, research significant developments from the previous seven days related to aging in place, home accessibility, fall prevention, AgeTech and home modifications in the United States.

Only include genuinely new developments such as:

- new research
- government programs
- regulatory changes
- product launches
- recalls or safety notices
- meaningful technology developments

For each item explain why it matters to an aging-in-place professional and provide the original source.

Do not include generic articles or recycled advice.

"Instead of remembering to research your industry every week, you've created your own Monday morning intelligence briefing."

Mic drop. 😊