

Perplexity for Aging in Place Pros

Build Your Own AI Research Department

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

WHAT THIS WORKBOOK IS FOR

The webinar shows you what to do. This workbook is where you actually do it. Every prompt from the session is here with blanks for your own market, plus worksheets to capture what you find so the research turns into decisions instead of forgotten browser tabs.

Every shaded box and every checkbox in this file is clickable. Fill it in on screen and save it, or print it and write in it. Either works.

INSIDE

Getting set up	Your research profile, the three things on screen, Search vs. Research
The four-step loop	Ask → Verify → Dig deeper → Apply
1. Local market opportunity	Where the demand is in your own county
2. Referral network	Ten prospects, five priorities, a reason to call
3. Product due diligence	What the review sites won't tell you
4. Funding programs	"Can we get help paying for this?"
5. Document analysis	Let it read the 48-page manual
Bonus	Your Monday morning intelligence briefing
Guardrails	Verification discipline, privacy, and your 30-day plan

How to use this workbook

Five minutes of setup makes every prompt in here work better.

Three ways people use this

Live, during the webinar	Keep it open in a second window. Fill in the profile on the next page first, then paste each prompt as we get to it.
Afterward, one job a week	Pick the section that solves your most annoying problem right now. Finish that worksheet before you move on.
As a repeatable system	The worksheets are meant to be reused. Run the market prompt once a year, the funding prompt twice a year, and the product prompt every time a client asks about something new.

Before you start

- ☐ Perplexity account created and logged in.
- ☐ Privacy settings reviewed. You have decided whether your data may be used for training.
- ☐ You know where the mode switcher is (quick **Search** vs. deeper **Research**).
- ☐ One Space or Project created to hold your ongoing work.
- ☐ A document you have been meaning to read, saved and ready to upload (under 40 MB).
- ☐ Your service area and service list written down. That's the next page.

ONE HONEST NOTE ABOUT SCREENSHOTS AND MENUS

The tool changes fast. Menu names, plan limits and feature availability move around, and some features (like Scheduled Tasks) depend on your plan. If a button isn't where the webinar showed it, the prompt still works — paste it into whatever the current research mode is called.

Your research profile

Fill this in once. You will paste these details into almost every prompt in this workbook, so make them specific.

Name and credentials

Business name

Primary service area — be exact (county, city, radius, state)

Services I offer today

Services I could offer but haven't launched yet

My ideal client, in one sentence

The three questions I waste the most time researching

THE ONE HOUR TEST

If this session saves you one hour a week, what would you use that hour on?

Why this tool, for this job

Different tools, different jobs. Using the wrong one is why research takes all afternoon.

Tool	What it's built for	What to ask it
ChatGPT / Claude	Thinking, drafting, analyzing, working through a plan with you. Trained on a snapshot of the world that updates every few months.	"Help me think through scheduling pins for Pinterest."
Google	Finding pages. You still open six tabs and assemble the answer yourself.	"Aging in place services near me."
Perplexity	Searching the live web right now and handing back an answer with citations attached.	"Research this question and show me where the information came from."

The three things on the screen

The answer Useful. Also the least important of the three.	The citations The actual product. This is what separates research from a guess.	The follow-up box Where the real work happens. Most people never use it.
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Search or Research?

Use quick Search when...	Switch to Research mode when...
You need one fact, one number, or a quick sanity check. "Is this program still running?" "What does this device cost?"	The question has several parts, you want many sources compared, or you'd otherwise spend an hour on it. Market analysis, funding landscapes and product due diligence all belong here.

Where I keep getting this wrong

The four-step loop

This is the whole method. One question, four moves, in the same thread.

1

ASK — Ask a professional question, not a keyword.

Keywords get you a summary of the internet. A professional question gets you a professional answer.

Weak: “grab bars seniors”

Strong: “What does current evidence tell us about grab-bar placement for older adults with balance limitations?”

2

VERIFY — Click the citations. Every single time.

The answer is a summary of sources. If the sources are weak, the answer is weak, and it will still sound confident.

Type: “Which claims in your answer are supported by primary sources, and which are not?”

3

DIG DEEPER — Push on the answer instead of accepting it.

This is where most of the value is, and where almost nobody goes. You are asking it to argue with itself.

Type: “What are the limitations of this recommendation?” / “What evidence contradicts this?” / “When would this be inappropriate?”

4

APPLY — Turn research into a professional decision.

The tool does not know your client, their bathroom, their budget or their balance. You do. This step is your job and it does not get outsourced.

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

Practice the loop on your own question

Use a real question you've been putting off. Work it all the way through before you move to the demos.

STEP 1 — My question, written like a professional asked it

STEP 2 — Sources I clicked, and whether they actually said what the answer claimed

STEP 3 — What I found when I asked for limitations and contradicting evidence

STEP 4 — What I will actually do differently in a client's home

THE TEST

If step 4 is blank, the research was entertainment. Go back to step 3 and push harder until something changes about how you'd handle a real case.

1

DEMO ONE — MARKET RESEARCH

Find local business opportunities

Most of us guess at where the demand is. Census data, housing age and disability prevalence are public — they are just tedious to assemble. This is exactly the kind of tedium worth handing off.

COPY THIS PROMPT INTO PERPLEXITY

Analyze the aging-in-place market in [YOUR COUNTY, STATE].

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 THESE NEXT

- *Of those opportunities, which three appear most promising for a small aging-in-place business, and why?*
- *What services could a CAPS professional, occupational therapist, contractor or home safety professional offer to address those needs?*

WHY THIS INSTRUCTION MATTERS

“Cite every important statistic and identify the year of the data” is the line that does the heavy lifting. Population figures from 2015 will lead you to the wrong conclusion about a fast-growing county, and old numbers look identical to current ones once they’ve been summarized.

Worksheet 1A — What the data says about my market

Record the number, the year, and the source. If you can't fill in the year column, you don't have a usable statistic yet.

Indicator	What I found	Year	Source	Cited?
Adults 65+ (count and trend)				☐
Older-adult homeownership rate				☐
Age of local housing stock				☐
Disability / mobility limitation prevalence				☐
Senior housing supply				☐
Programs supporting aging at home				☐
Other indicator worth noting				☐
Other indicator worth noting				☐

The one number that surprised me most

What this tells me about where demand is going in the next five years

Worksheet 1B — From data to opportunity

Five unmet needs, narrowed to three, turned into services you could actually deliver.

The five unmet needs it identified

1

2

3

4

5

My top three — and the honest reason each one made the cut

#	Opportunity	Why it fits <i>my</i> skills, capacity and market
1		
2		
3		

Services I could offer to meet those needs

PICK ONE

The opportunity I will test first, and the smallest possible version of it I could launch in 30 days:

2

DEMO TWO — PARTNERSHIPS

Build a referral network

Most professionals know they need referral partners. The hard part is figuring out who those partners actually are — and having a reason to call that isn't "please send me business."

COPY THIS PROMPT INTO PERPLEXITY

I provide aging-in-place and home safety services in [YOUR COUNTY, STATE].

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.

THEN DON'T START A NEW SEARCH — TYPE THESE NEXT

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

Two instructions doing the heavy lifting

“VERIFY THAT EACH ORGANIZATION APPEARS TO BE CURRENTLY OPERATING”

AI tools will confidently list businesses that closed two years ago, because the web still remembers them. Asking it to confirm current operation won't catch everything, but it catches a lot — and it flags what it couldn't confirm so you know where to check.

“A REASON THAT DOES NOT BEGIN WITH ASKING FOR REFERRALS”

This is the difference between networking that works and networking that annoys people. A reason to call that serves them — a resource they'd want, a gap you noticed, a question only they can answer — gets a response. “I'd love referrals” gets ignored.

Worksheet 2A — Prospects 1 through 5

#	Organization & website	What they do	Why they fit	Evidence + still operating?
1				
2				
3				
4				
5				

Worksheet 2B — Prospects 6 through 10

#	Organization & website	What they do	Why they fit	Evidence + still operating?
1				
2				
3				
4				
5				

Worksheet 2C — My first five calls

Rank them, then write the reason you're reaching out. Not a referral ask. A reason *they* would care about.

Rank	Organization	My reason for contacting them (not a referral ask)	Date sent	Reply?
1				
2				
3				
4				
5				

3

DEMO THREE — DUE DILIGENCE

Become a better product researcher

Clients constantly ask about products none of us have personally used. AI should never replace professional judgment — but it can compress three hours of reading into fifteen minutes, and it can find the limitations that the marketing page leaves out.

Pick a category your audience actually asks about: stairlifts, automated medication dispensers, monitoring systems, bidet seats, smart locks, transfer devices, shower products, doorway threshold ramps.

COPY THIS PROMPT INTO PERPLEXITY

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 DON'T START A NEW SEARCH — TYPE THESE NEXT

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

Worksheet 3A — Product comparison

Product category: fill in below. Then capture what matters, not what the marketing page says.

Product category _____

Criterion	Option A	Option B	Option C
Approximate cost			
Installation requirements			
Ongoing subscription			
Warranty			
Weight / physical limits			
Accessibility considerations			
Caregiver requirements			
Compatibility requirements			
Documented complaints			
When it is NOT appropriate			
Source quality (manufacturer? independent? affiliate?)			

Worksheet 3B — Before you recommend anything

The research narrows the field. These questions decide the answer.

Questions I should ask the client first

Capture what the follow-up prompt gave you, then add the ones only an experienced clinician or contractor would think of.

- 1
- 2
- 3
- 4
- 5
- 6

Red flags I would only catch from experience

The transfer that looks fine in the product video but not in a 1962 bathroom. The subscription the family will cancel in month four. The device that assumes a caregiver is home.

MY PROFESSIONAL JUDGMENT

Which option would I recommend, for which client, under what conditions — and what would make me recommend none of them?

4

DEMO FOUR — FUNDING PROGRAMS

“Can we get help paying for this?”

This is the question every family asks and almost nobody can answer well, because the programs are scattered across federal, state, county, nonprofit and veteran sources — and half the pages describing them are out of date.

COPY THIS PROMPT INTO PERPLEXITY

Research current programs that may help an older homeowner in [YOUR STATE] 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.

THE MOST IMPORTANT LINES IN THIS ENTIRE WORKBOOK

Those last three sentences change the output completely. You are no longer asking for information — you are asking it to try to verify, and to tell you where it failed. A list of programs it *couldn't* confirm is often more useful than the list it could, because that's your call list.

Worksheet 4A — Funding programs in my state

One row per program. Leave nothing in the source column blank.

#	Program name	What it may pay for	Who qualifies	Official source
1				
2				
3				
4				
5				
6				

Worksheet 4B — Verification log

Never repeat a funding claim to a family until this row is complete. Programs close, run out of money, and get waitlisted without updating their websites.

#	Program	How I verified (call, .gov page, email)	Date	Status: open / waitlist / closed
1				
2				
3				
4				
5				
6				

5

DEMO FIVE — DOCUMENT ANALYSIS

Let it read the boring stuff

A 48-page installation manual. A government program guide. A housing study. A manufacturer spec sheet. An accessibility report. Perplexity accepts PDFs and other text files, plus images, audio and video, up to 40 MB.

COPY THIS PROMPT INTO PERPLEXITY

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.

WHY THE PAGE NUMBERS MATTER

Item 5 is what makes this trustworthy. Page numbers mean you can spot-check in thirty seconds, and they force the answer to stay anchored to the document instead of drifting into general knowledge about the topic.

PRIVACY PRE-FLIGHT — RUN THIS BEFORE EVERY UPLOAD

- ☐ This file contains no client name, address, birthdate, phone number, photo or medical record.
- ☐ If it started as a client document, I stripped the identifiers or retyped only the facts I need analyzed.
- ☐ I know where this file lives afterward: session files are retained for a period, files in a Space or Project stay until I delete them.
- ☐ I have checked any HIPAA obligation or business associate agreement that applies to me.
- ☐ I have a calendar reminder to delete this upload when the project is finished.

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

Worksheet 5 — Document debrief

One page per document. Keep it with the file.

Document _____ Date _____

The five things I most need to know

#	What it says	Page
1		
2		
3		
4		
5		

Limitations, exclusions or warnings that could affect an older adult

What I might have overlooked

What I still need to investigate

BONUS — AUTOMATION



Your Monday morning intelligence briefing

Instead of remembering to research your industry every week, you set it up once and it arrives. Perplexity's Scheduled Tasks feature currently lives in Perplexity Computer, runs recurring monitoring and briefings, uses Computer credits, and depends on your plan and access.

SET THIS UP AS A RECURRING TASK

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.

Make it earn its place

- ☐ Narrow the topics to what you actually serve. A briefing about everything is a briefing about nothing.
- ☐ Add your state or region if local policy matters to your work.
- ☐ Block twenty minutes Monday to read it. An unread briefing is worse than no briefing.
- ☐ Pull one item a week into a newsletter, a post, or a client conversation. That's the return on this.
- ☐ Review it monthly. If three weeks in a row are noise, tighten the exclusions.

Worksheet 6 — Four weeks of briefings

Track what you actually used. This is how you find out whether the automation is working.

Week of	The one item worth keeping	Source	Where I'll use it

After four weeks

What I'd narrow, add or exclude from the prompt

What this briefing has already changed about how I work

Verification discipline

The citations are the product. Here is how to actually use them.

Red flags in an answer

No year on a statistic	Demographic and cost data ages badly. An undated number is an unusable number.
Every source is a review site	Affiliate content optimizes for commission, not for the client in the 1962 bathroom.
A program with no official page	If you can't find it on a .gov or the organization's own site, treat it as a lead, not a fact.
Suspiciously clean consensus	Real evidence has disagreement in it. If everything agrees, ask what contradicts it.
Confident numbers with vague sourcing	Precision and citation should travel together. When they don't, check.
A business with no current signal	No recent reviews, no updated hours, no active site. Call before you refer anyone.

Three follow-ups that catch most problems

COPY THESE INTO THE FOLLOW-UP BOX

→ Which claims in your answer are supported by primary sources, and which are not?

→ What is the publication date of each source you used?

→ What would someone who disagrees with this answer say, and what evidence would they cite?

MY LINE IN THE SAND

Things I will never pass along to a client or publish without independent confirmation:

Your 30-day plan

One job a week. Write the date you'll do it, not the week you hope to.

WEEK 1 Know your market

Run the market prompt for your county. Fill in Worksheet 1A and 1B. Pick the one opportunity you'll test.

I'll do it on:

☐

WEEK 2 Build the network

Run the referral prompt. Complete Worksheets 2A–2C. Send at least three outreach messages using a non-referral reason.

I'll do it on:

☐

WEEK 3 Get sharper on products and money

Run product due diligence on your most-asked category and the funding prompt for your state. Verify the top three programs by phone or official page.

I'll do it on:

☐

WEEK 4 Automate and systematize

Upload the document you've been avoiding. Set up the Monday briefing. Decide which of these five jobs becomes a permanent part of how you work.

I'll do it on:

☐

The recurring habit I'm committing to (weekly? monthly? which prompt?)

How I'll know in 90 days whether this was worth the hour

Appendix A — Follow-up prompts that do the real work

The first answer is the starting point. These are what you type next.

TO TEST THE EVIDENCE

- Which claims in your answer are supported by primary sources, and which are not?
- What is the publication date of each source you used?
- What could not be verified, and what would I need to check myself?
- Which of these sources are affiliate or commercial sites?

TO FIND THE WEAK SPOTS

- What are the limitations of this recommendation?
- What evidence contradicts this?
- Under what circumstances would this recommendation be inappropriate?
- What is the strongest argument against the conclusion you just gave me?

TO NARROW AND PRIORITIZE

- Of these options, which three are most promising for a small business, and why?
- Rank these by which I should act on first. Explain your reasoning.
- What would this look like for a client on a limited budget?

TO TURN RESEARCH INTO ACTION

- Based on this research, what should an aging-in-place professional consider when evaluating this issue in a client's home?
- What questions should I ask the client before recommending any of these?
- Summarize this for a family caregiver at a seventh-grade reading level.
- Turn this into five questions I could ask on a first phone call.

Appendix B — The sentences that upgrade any prompt

Add these to a prompt you already use and the quality of the answer changes immediately.

Cite every important statistic and identify the year of the data.	Stops undated numbers from slipping through as if they were current.
Prioritize government, university, nonprofit and other authoritative sources.	Pushes the answer away from content farms and toward primary material.
Prioritize manufacturer documentation and independent reputable sources over affiliate review sites.	The product-research version of the same instruction.
Do not assume a program is active simply because an older webpage mentions it.	Forces a currency check instead of an archaeology report.
Clearly identify anything you cannot verify.	Turns the gaps into a to-do list instead of hiding them inside confident prose.
Verify that each organization appears to be currently operating.	Catches a surprising number of businesses that closed years ago.
Do not simply give me a list of features.	Blocks the marketing-brochure answer and forces analysis.
Include situations where this would NOT be appropriate.	The single most useful instruction for anyone who makes clinical recommendations.
Give me the page number where each important point appears.	Makes document analysis spot-checkable in thirty seconds.
Finish by identifying five potential unmet needs or opportunities.	Converts a research summary into something you can act on.

WHY THIS WORKS

You are not writing spells. Every one of these sentences is just a professional standard written down — the same standards you'd apply to a student, a vendor, or a colleague handing you a recommendation. Hold the tool to them.

Notes

Whatever the worksheets didn't have a box for.

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

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